



DELTA CHI

OFFICER ELECTIONS AND TRANSITIONS BRIEF

Updated July 2025

Introduction:

The Foundation We Build On

PURPOSE OF THIS BRIEF

This BRIEF provides Delta Chi chapters with a systematic approach to conducting officer elections and transitions that preserve institutional knowledge, maintain chapter momentum, and develop strong leaders prepared to serve with excellence.

THE FOUNDATION OF STRONG LEADERSHIP

Consistent elections and intentional transitions create the foundation for chapter excellence. This ensures leadership knowledge transfers effectively from outgoing to incoming officers. With effective transitions, new officers start with clear direction, and the chapter maintains momentum year after year.

LEADERSHIP STRUCTURE OVERVIEW

EXECUTIVE BOARD

Chapters may promote chair positions to serve on the executive board, but may not add any additional “lettered” officer roles.

- **“A” - President:** responsible for overall chapter leadership, vision, and external representation to the international headquarters and the college/university.
- **“B” - Vice President:** responsible for the supervision of all chair positions, including programming and member development. Serves as the backup to the “A”.
- **“C” - Secretary:** responsible for meeting records, internal / external communication, and maintaining chapter documents.
- **“D” - Treasurer:** responsible for budget management, dues collection, and all financial reporting.
- **“E” - Alumni Relations:** responsible for alumni engagement, networking programs, and maintaining an alumni database for communication.
- **“F” - Risk Management / Sergeant-at-Arms:** responsible for policy compliance, safety training, event monitoring, and internal accountability procedures.

CHAIR POSITIONS

For smaller chapters with limited membership, consider rotating seasonal roles based on the chapter calendar, or combining roles with similar functions.

- **Associate Member Counselor (AMC):** oversee the associate member education and onboarding experience as prescribed by the International Headquarters, including associate member integration into the chapter as an active member.
- **Recruitment Chair:** responsible for developing strategy for recruiting prospective members, organizing and managing related events, and building relationships.
- **Mentor Program Manager:** oversee the selection, notification, and training of mentors to join the Mentor Committee to provide intentional growth and development for all chapter members.

- **Scholarship Chair:** monitor academic performance, coordinate support programs, and maintain connection to campus and community academic support resources.
- **Diversity, Equity, and Inclusion / Member Experience Chair:** oversee and coordinate member development programming focused on creating an inclusive chapter and sense of belonging among members.
- **Interfraternity Council (IFC) Delegate:** represent the chapter during IFC meetings (or similar campus governing council) and update the chapter on any community needs or proposed bylaw revisions.
- **Service Chair:** develop partnerships with local community agencies, coordinate service projects, and track completed service hours among members.
- **Philanthropy Chair:** coordinate and plan fundraising activities to support local causes as well as the V Foundation for Cancer Research.
- **Brotherhood Chair:** coordinate and plan internal chapter programs, member engagement and retention activities for relationship building.
- **Social Chair:** coordinate and plan external chapter programs and events with other organizations and guests.
- **Public Relations Chair:** market and promote the chapter's initiatives through external means of communication, including social media.
- **Health and Wellness Chair:** oversee and coordinate member development programming focused on physical and mental wellbeing initiatives.

ADVISORY SUPPORT

- **"BB" - Chapter Advisor:** primary volunteer local advisor for the chapter to give guidance on operations, policy compliance, and member development.
- **Alumni Board of Trustees (ABT):** group of volunteer advisors who provide ongoing support and strategic oversight of chapter operations with subject-matter engagement. Roles include: ABT President, ABT Secretary, ABT Treasurer, ABT Alumni Relations Advisor, ABT Risk Management Advisor, ABT Recruitment Advisor, ABT Ritual Advisor, ABT Scholarship Advisor, ABT Philanthropy and Service Advisor, and/or ABT Member Education Advisor. Officers and chairs should meet regularly with their ABT advisor.
- **House Corporation:** for housed organizations or those who own/operate a local facility, a house corporation will have volunteers who oversee the financial and/or management oversight of the asset. This may include things like leases, maintenance, and improvement projects.
- **Faculty Advisor:** a college/university faculty or staff member who volunteers to serve as an advocate for the chapter within the institution and provides academic guidance.
- **Fraternity/Sorority Life Advisor:** a college or university employee, typically who works with specific student organizations and engagement for campus oversight and support of recognized fraternal organizations. This person should be different from the chapter's Faculty Advisor.
- **Vice Regent:** a regionally appointed Delta Chi volunteer to work with a group of chapters in a subregion to support chapters with operational needs.
- **Regent:** an elected volunteer who serves as a representative for all undergraduate and alumni chapters within the same geographic region on the Board of Regents.
- **International Headquarters (IHQ) Officer Success Manager:** a paid staff member who works at IHQ and provides targeted support to specific executive board officers and chairs, including updating resources and offering training for those roles.

RECOMMENDED ELECTION AND TRANSITION TIMELINE

The regular academic year for the majority of Delta Chi chapters begins in August/September and ends in May/June. It is recommended that chapters elect on a calendar year cycle instead of an academic year cycle to maximize the training opportunities provided by the International Headquarters. With this outline in mind, the following is the recommended timeline for an officer and chair position:

- Hold **elections** between October - December, with final reporting of officers due to be updated in Vault by December 15 each year.
- **Transitions** between officers and chairs should occur after elections but before the January Regional Leadership Academy (RLA) program.
- Required officers and chair positions should **attend RLA**, and chapters must meet minimum attendance expectations.
- Following RLA, chapters should then **host an officer retreat** to review and share information and action plans.
- Officers and Chairs will then fully **execute their roles** until the next election.

OFFICER TRANSITION PHILOSOPHY

BUILDING WHAT COMES NEXT

Leadership transitions aren't the end of something, they are the beginning of what comes next. Each year, Delta Chi chapters elect new officers who inherit not just a set of responsibilities, but a foundation on which to keep building. A strong officer transition allows your chapter to maintain momentum, transfer knowledge, and keep progressing toward excellence, no matter who is in the role.

Transitions should not be passive or rushed. They are a deliberate opportunity to reinforce the culture, values, and direction of your chapter. More than that, they ensure the success of the next team and the chapter itself.

WHY TRANSITIONS MATTER

Effective officer transitions help chapters:

- Preserve the progress made by an outgoing team of officers and chairs.
- Give new officers and chairs a head start instead of a re-set.
- Create consistent expectations each year.
- Help individuals grow, reflect, and prepare to lead.

When handled intentionally, transitions will empower your chapter to lead with purpose instead of starting over from scratch.

MOMENTUM IS THE GOAL

Every Delta Chi officer has a responsibility to leave the chapter better than when they joined or took office. This means it is not about titles - it's about momentum. Outgoing officers should provide context, strategy, and unfinished ideas. Incoming officers should build on those pieces, refine them, or take them in new directions. Transitions are where your chapter shifts from what was to what's next.

Key Questions to Ask:

- What did we build that's worth continuing?
- What needs to evolve?
- What lessons do we need to carry forward?

GROWTH THROUGH RESPONSIBILITY

Officer transitions challenge members to live our values and put them into action. Outgoing officers must be organized, honest, and reflective. Incoming officers must take initiative, ask questions, and begin making decisions early. This is not just about learning how to lead, it's about learning how to lead well.

VALUES IN ACTION

Serving as an officer is one of the clearest ways to put our values into action, and how you prepare the next person to take over is just as important. Officer transitions don't just maintain momentum — they reflect what we stand for. Each part of the transition process connects directly to a core value of Delta Chi.

- **Promote Friendship:** Foster the lifelong bonds that define Delta Chi. Strong leaders build genuine relationships with their brothers, not just manage tasks. During transitions, outgoing officers mentor incoming leaders as brothers invested in each other's success—creating bonds built on trust, shared responsibility, and mutual respect.
- **Develop Character:** Lead with integrity in both your tenure and your transition. This means being honest about your successes and failures, holding yourself accountable to high standards, and preparing your successor to excel. Character is shown through how you handle difficult decisions and whether you leave your role better than you found it.
- **Advance Justice:** Do the right thing as a leader, even when it's unpopular or difficult. This means making fair decisions, conducting honest elections, being transparent about chapter challenges, and ensuring both outgoing and incoming officers fulfill their obligations to the brotherhood with integrity.
- **Assist in the Acquisition of a Sound Education:** Help your fellow members succeed academically and personally through your leadership. Create systems and culture that support academic achievement, share knowledge and resources effectively during transitions, and ensure that leadership itself becomes a learning experience that develops future leaders.

Transitions are a shared commitment. They are a way to build trust across generations and keep the chapter's mission moving. Transitions ensure leadership in Delta Chi is not a placeholder, but a continued call to action. A strong transition gives incoming officers more than just information, but clarity, confidence, and momentum.

Election and Transition Timeline: Crafting Tomorrow's Leaders

This section provides a comprehensive election and transition framework, designed to produce stronger officers by building thoughtful preparation into every step of the process. The timeline prioritizes education, intentionality, and seamless handoff to ensure leaders are equipped with tools they need for success before taking office.

HOW THE PROCESS WORKS

This model is structured around three election sessions integrated into your regular chapter meetings over the course of three to six weeks, supported by focused preparation periods in between. Chapters should begin this process no later than early October to ensure all officer elections are complete and Vault is updated by the December 15 deadline. This also provides the opportunity for new officers to be trained in time for next term operations and so they are able to attend RLA to finish their training and onboarding into their roles. Each phase of the process is built to maximize engagement and preparedness.

- **Chapter Meeting Session #1:** Election Launch and Officer Education
- **Preparation Block #1:** Candidate Exploration and Preparation
- **Chapter Meeting Session #2:** Formal Nomination
- **Preparation Block #2:** Campaigning and Election Readiness
- **Chapter Meeting Session #3:** Elections
- **Officer Transition Phase #1:** 72 Hour Administrative Window
- **Officer Transition Phase #2:** Development and Onboarding

By investing in each of these phases, your chapter will build a leadership culture grounded in transparency, intentional development, and strategic planning.

CHAPTER MEETING SESSION #1:

ELECTION LAUNCH AND OFFICER EDUCATION

TIMELINE

This session should be held within your first regular chapter meeting of the election season, usually in October. This will kick off the elections process with purpose and structure.

DURATION

This should last about 45-50 minutes of your meeting agenda.

OBJECTIVE

Educate members on the election process and basics of each officer role to encourage informed participation. This is more than an announcement that elections are coming, it should be a comprehensive education session to clarify expectations, explain the nomination and voting timeline, and encourage thoughtful engagement.

PRE-MEETING PREPARATION CHECKLIST

- Download all current position descriptions from Delta Chi's officer resources, either print copies in advance or ensure they are ready to be displayed on a screen.
- Ensure all officers are available for a panel discussion. Develop a contingency plan if someone is unavailable or a role is currently vacant.
- Review chapter bylaws for election procedures.
- If using leadership interest forms, print enough copies (see appendix for more information on this form).

MEETING AGENDA

Welcome and Frame the Process (5 Minutes)

Open by explaining why structured elections matter. Leadership is about service and accountability, not titles or recognition.

Sample language: "Today we begin selecting the brothers who will guide our chapter through the next year. This process isn't just about filling positions—it's about identifying members ready to serve our brotherhood and advance our shared values."

Election Timeline Walkthrough (5 Minutes)

Walk through the complete election schedule, including deadlines, nomination procedures, and transition expectations. Ensure every member understands the timeline from today through officer installation. Be sure to cover:

- Nomination meeting date and process
- Election meeting date and format
- Transition timeline and expectations
- December 15 as deadline to update officers in Vault

Election Rules and Bylaws Overview (5 Minutes)

Review chapter bylaws regarding nominations, eligibility, voting methods, and terms of office. If using Robert's Rules, explain nomination and voting procedures. Critical Elements to cover include:

- Who is eligible to nominate/vote
- Nomination acceptance requirements
- Voting method (secret ballot vs. voice vote)
- Tie-breaking procedures
- Installation timeline

Officer Role Breakdown (10 Minutes)

Distribute position descriptions from Delta Chi website, or pull up digital versions on a display screen if available. Each officer should cover the following about their position:

- Key responsibilities (use the summaries from earlier in this BRIEF as a guide)
- Time commitments weekly and during busy periods
- Major events or deadlines managed by the role
- Key relationships to build (advisors, IHQ, and on campus)
- Common challenges faced by those in the role
- Focus on what kind of person succeeds in each position and skills needed for success

Officer Panel Discussion (15-20 Minutes)

Facilitate a candid panel with current officers. Structure questions to provide genuine insights, and encourage honesty over sugar-coating an experience. This is about setting realistic expectations for interested candidates. Sample questions include:

- What does your average week look like in this role?
- What's been your biggest challenge? Your biggest success?
- What would you do differently if you had another term?
- What qualities do you look for in your successor?
- What's one thing you wish you'd known before taking this position?

Wrap Up and Next Steps (5 Minutes)

To conclude this section, the facilitator should distribute Leadership Interest Forms if they are being used. Interested candidates should be encouraged to schedule one-on-one meetings to get more information from current officers. End by answering any immediate questions and remind members of the nomination meeting date.

PREPARATION BLOCK #1:

CANDIDATE EXPLORATION AND PREPARATION

TIMELINE

These should be held one to two weeks after the election information session during the chapter meeting, but before the nomination session chapter meeting.

OBJECTIVE

To assist potential candidates in making informed decisions and to prepare thoughtful campaigns. This preparation window is critical - it is where strong candidates are developed, not just discovered. The goal is to ensure every member who runs is truly prepared for the next step.

WHAT CURRENT (OUTGOING) OFFICERS NEED TO DO

Make Yourself Available

- Block out times when interested candidates can meet with you one-on-one
- Plan for 20-30 minute conversations focused on the reality of the role
- Be honest about both the rewards and the challenges—don't oversell or undersell
- Help candidates understand what success looks like in your position

Key Topics to Cover in These One-on-One Meetings

- What your typical week actually looks like (busy vs. slow periods)
- The biggest challenges you've faced and how you handled them
- Who you work with most (advisors, other officers, external contacts)
- Tools, systems, and resources that make the job easier
- What you wish someone had told you before you took the role
- Your honest take on the time commitment and stress level

Executive Board Follow-Up

- Check in with members who showed interest or submitted an interest form (if using)
- Make sure candidates are actually scheduling their one-on-ones
- Prepare logistics for the upcoming nomination meeting

WHAT CANDIDATES SHOULD DO

Have Real Conversations with Current Officers

This should not be seen as optional. Every serious candidate should sit down with the person currently in the role, and come prepared with specific questions about day-to-day responsibilities, time management, and challenges.

Do Some Honest Self-Reflection

After talking with officers who hold roles you are interested in, ask yourself:

- Can I realistically handle this workload during my busiest academic periods?
- What would I actually bring to this role that others might not?
- Do I have specific ideas for improving the chapter or this position?
- How does this commitment fit with my other obligations?

Start Preparing Your Case

Before nominations, work on:

- A brief (two to three) minute speech that focuses on your vision, not just your résumé
- Two or three concrete goals you want to accomplish in the role
- Your answer to "Why are you the right person for this job?"

CHAPTER MEETING #2:

FORMAL NOMINATION SESSION

TIMELINE

This session should be during a regular chapter meeting one to two weeks after the launch meeting, typically the end of October or beginning of November.

DURATION

This should last about 30-35 minutes of your meeting agenda.

OBJECTIVE

To formally establish a candidate slate following proper procedures. This session should be integrated into your regular chapter meeting to open the campaign period and must follow the procedures established in your chapter's bylaws to ensure fairness and transparency.

PRE-MEETING CHECKLIST

- Review your chapter's nomination procedures and Robert's Rules of Order
- Verify member voting and nomination eligibility
- Prepare recording sheets for each position
- Ensure the "C" is prepared to take detailed notes
- The room should be set up so everyone can hear and actively participate

MEETING SESSION AGENDA

Set Ground Rules (5 Minutes)

Begin by ensuring that all members present understand the process to be followed. Give a reminder on who can nominate and who is eligible to vote, and explain the nomination procedure you'll follow. Clarify expectations for the actual election meeting (ex. length of speech), and answer any final questions about the process.

Go Through Each Position (20-25 Minutes)

Work through every officer position systematically, keeping it positive and exciting and following the same process each time:

- Announce the position - Chair states which office is being nominated
- Open the floor - "The floor is now open for nominations for [position]"
- Accept nominations - Each nomination must be made and seconded by eligible members. If a position does not get nominees, the "C" should make a note. Don't dwell on it now and address a vacancy later.
- Get immediate acceptance - Nominees must accept or decline on the spot, and the floor should be opened for debate or discussion.
- Record everything - "C" writes down all accepted nominations for official record.
- Close when done - When no more nominations come forward, move to the next position until all have been covered.

Set Up for Elections (5 Minutes)

Wrap up by covering logistics for the actual election:

- Confirm the date, time, and location of the election meeting.
- Remind candidates about speech expectations (length, content focus).
- Address any campaign guidelines or conduct expectations.
- Let candidates know about any platform-sharing opportunities (ex. meet and greet).

PREPARATION BLOCK #2:

CANDIDATE EXPLORATION AND PREPARATION

TIMELINE

This should be held in the timeframe between the nominations chapter meeting and the elections chapter meeting.

OBJECTIVE

To assist nominated candidates in preparing solid campaigns and to help members make informed decisions. This is a “crunch time” for candidates. It’s their chance to refine their message, connect with members, and get ready for the elections meeting. The executive board should then be working to handle election logistics.

WHAT CURRENT (OUTGOING) OFFICERS NEED TO DO

Prepare Election Meeting Logistics

- Get ballots designed and printed or set up your digital voting system.
- Choose someone to moderate the election meeting who can keep things moving.
- Line up the vote counters/tellers and make sure they know the voting process.
- Review procedures for what happens in the event of a tie.
- Set up the meeting room for voting privacy.

Handle any Gaps

- If positions did not receive nominations, reach back out to interested members.
- Consider if someone who submitted a Leadership Interest Form may step up.
- Plan how to address any unfilled positions during the election meeting.

Optional Ways to Help Members Decide

Consider how you are sharing information. Some chapters find it helpful to:

- Have candidate submit a brief summary of their platform to share in advance with members.
- Hold a casual question and answer session where members can get more information from the current candidates.
- Organize an informal meet-and-greet or event during this period.

Make sure to keep it balanced so that all candidates receive equal opportunities to share their message. You will want to avoid letting any campaigning become divisive or negative - remember, friendships matter more than any election.

The goal should be to give everyone - candidates and voters - the information they need to make the election meaningful and productive.

WHAT CANDIDATES SHOULD DO

Perfect Your Speech

- Keep it to two to three minutes. Try practicing with a timer to prepare.
- Lead with your vision, not your résumé - if you’d been nominated, it’s likely that other members already know about your involvement or qualifications.
- Select two or three specific things you want to accomplish - you don’t need a laundry list of things.
- Practice your speech out loud, ideally in front of other people you trust to give feedback.
- Think about questions members might ask and prepare your answers.

Develop Your Platform

- Be clear about what you think the priorities of the chapter should be.
- Come up with realistic improvements that you could actually implement.
- Think about how the role you are running for connects to the bigger picture.
- Do not promise things that are outside of the control of your desired position.

Connect with Members (If Permitted)

Each chapter has their own rules around campaigning, but common approaches include:

- Having genuine conversations with other members about the direction of the chapter.
- Sharing brief written platforms in a group chat or email.
- Be present and engaged at chapter events.
- Answer questions honestly when members ask about your plans.

CHAPTER MEETING #3:

CANDIDATE EXPLORATION AND PREPARATION

TIMELINE

Session within a regular chapter meeting, held one to two weeks after nominations.

DURATION

60-75 minutes of your meeting agenda

OBJECTIVE

To conduct fair and efficient officer elections following the proper procedures. This session should represent the culmination of your entire election process and should be treated as the most important meeting of the term. Elections determine who will lead your chapter for the next year, making this both a significant responsibility and an opportunity to demonstrate your chapter's commitment to democratic governance and thoughtful leadership selection.

PRE-MEETING PREPARATION CHECKLIST (COMPLETED 24-48 HOURS IN ADVANCE)

Administrative Setup

- *Ballot Preparation:* Prepare digital voting system or confirm that ballots are ready for each contested position, with clearly listed candidate names and simple voting instructions. This should reflect any updates from the nomination period.
- *Voting Infrastructure:* Set up a private voting area away from the main meeting space to ensure confidentiality for where ballots may be turned in.
- *Personnel Assignments:* Recruit and prepare two or three tellers for vote counting, ensuring they understand the process and can maintain impartiality.
- *Meeting Management:* Confirm that your moderator is prepared with timing protocols and knowledge of parliamentary procedures.
- *Documentation Preparation:* Prepare official results sheets and ensure that the "C" has materials ready to record results in the minutes.

Logistical Considerations

- *Room Setup:* Arrange seating to facilitate clear sight lines and easy ballot distribution.
- *Technology Check:* Test any timing devices, microphones, or presentation equipment.
- *Contingency Planning:* Prepare procedures for handling ties, technical difficulties, or procedural challenges.
- *Materials Checklist:* Verify you have sufficient timers, and if using printed ballots, writing utensils and ballot collection boxes.

MEETING SESSION AGENDA

Session Opening and Meeting Purpose (5 Minutes)

Begin with a serious tone appropriate for the occasion. This is not just another chapter meeting, it's a democratic process that will shape the future of your chapter.

Sample Opening: "Today we exercise one of our most important responsibilities as members of this chapter. The officers we elect will represent our values, advance our mission, and guide our brotherhood through the coming year. Let's approach these decisions with the seriousness and thoughtfulness they deserve."

From here, you will need to give an overview of the process so far, including:

- Review of the complete election timeline and procedures.
- Clarification of voting eligibility and any special requirements.
- Address any final procedural questions
- Emphasize the importance of respectful, professional conduct throughout elections.

Officer Elections by Position (65 Minutes)

Officers must be elected in order of chapter hierarchy, with the “A” going first, followed by the “B”, “C”, “D”, “E”, and “F”. Chapters should determine in advance if they will follow election procedures for certain chair positions (ex. Associate Member Counselor), or if these will be appointed later following procedures outlined in your bylaws.

For each office, complete the following cycle:

- **Position Introduction (2 Minutes)**
 - *Role Overview:* Moderator briefly reviews key responsibilities and expectations
 - *Candidate Announcement:* Introduce all candidates running for the position
 - *Process Reminder:* Confirm speech time limits and voting procedures, then ask candidates to leave the room.
- **Candidate Presentations (6-9 Minutes, depending on number of candidates)**
 - *Speech Guidelines:* Each candidate should be brought into the main space one at a time to deliver a maximum of a three minute speech about their candidacy.
 - *Timing Protocol:* Use visible timer, with moderator providing a 30-second warning and calling for a stop if time is reached.
 - *Order Determination:* Use predetermined random order or alphabetical sequence.
- **Optional Question Period (3-5 Minutes per candidate)**
 - *Membership Questions:* Allow for one or two substantive questions from the floor to the candidate, with each candidate being asked the same questions, from the same members, in the same order.
 - *Time Management:* Limit responses to questions to one minute.
- **Discussion Period (3-5 Minutes)**
 - *Candidate-Free Discussion:* After all speeches are completed, candidates should exit the room.
 - *Member Dialogue:* Facilitate a brief discussion among voting members about the needs of the chapter and how the candidates align.
 - *Ground Rules:* Keep comments respectful and focused on leadership readiness, chapter priorities, and values.
 - *Moderator Role:* Ensure balanced participation and keep the conversation on track.
- **Voting Process (3-5 Minutes)**
 - *Candidate Discussion:* All candidates should exit the room. If permitted by chapter bylaws, allow for a brief period of discussion from the floor. If not, proceed to ballot distribution or voting.
 - *Ballot Distribution:* If using paper ballots, tellers should distribute these to eligible voting members only. If using electronic means, tellers should provide that resource.
 - *Voting Privacy:* Direct members to designated voting area for confidential ballot completion and collection.
 - *Collection Protocol:* Tellers should collect completed ballots and secure them for counting.
 - *Verification:* Tellers should confirm the received ballot count matches the number of eligible voters before proceeding.

- **Vote Counting (5-7 Minutes)**

- *Teller Responsibility:* Tellers should count votes while the moderator maintains meeting order. Counting should be conducted in view of membership while maintaining ballot confidentiality.
- *Verification Process:* Confirm final counts and immediately resolve any discrepancies.
- *Documentation:* The “C” should Record exact vote tallies for official minutes.

- **Results Announcement (1 min)**

- *Winner Declaration:* Bring all candidates back into the room, and the moderator should congratulate and announce the winner immediately upon verification.
- *Transition Note:* Remind newly elected officer of upcoming transition requirements

Session Conclusion & Next Steps (5 Minutes)

End the elections session by thanking all candidates for their willingness to serve, regardless of the election outcome - running for office demonstrates a commitment to the future of the chapter.

Congratulate the newly elected officers and remind them of the trust that has been placed in them by members, and announce any specific dates and expectations for their transition, including:

- Individual position handoff meetings
- Administrative updates and system access
- Officer team orientation session
- Regional Leadership Academy registration

Address any urgent questions about the transition process, but save detailed discussions for dedicated transition meetings. Conclude on a positive note that emphasizes unity and forward momentum, regardless of any competitive aspects of the elections

ELECTION MANAGEMENT BEST PRACTICES

- For contested races, always use secret ballot voting to ensure member privacy and reduce pressure.
- For uncontested races, a voice vote or acclamation may be used (depending on bylaws), but consider secret ballot for consistency or to allow for abstentions without pressure.
- In the event of a tie, have a clear protocols established and communicated before elections begin (ex. runoff election, coin flip).
- If any procedural issues arise, address those questions or challenges immediately, do not let them fester.
- Maintain a professional atmosphere throughout the election procedures - this is a serious business that deserves respect.

The “C” must document everything for official chapter records and future reference.

TRANSITION PART ONE:

SEVENTY-TWO (72) HOUR ADMINISTRATIVE WINDOW

TIMELINE

This begins immediately following the election session.

OBJECTIVE

To ensure seamless administrative transition and stakeholder notification.

CRITICAL ACTIONS TO BE COMPLETED

The immediate post-election period is critical for maintaining operational continuity and meeting organizational obligations. Swift administrative action prevents gaps in communication and ensures all stakeholders are properly informed of leadership changes.

System Updates

- The “C” should update all officer roles in Vault to automatically synchronize with the international headquarters database and chapter management systems.
- The results of the election should also be reported by the “C” on the Chapter Meeting Report of the meeting, including official vote tallies and procedural notes.

Stakeholder Communication

- Notification should be sent to the “BB” - Chapter Advisor, if they are not present for elections, about the results and the transition timeline.
- Inform the Alumni Board of Trustees of the newly elected officers, their contact information, and the transition timeline.
- Submit the updated officer roster to the campus Fraternity/Sorority Life or Student Organization Office.

Digital Asset Management

- The chapter’s website and social media pages should be updated with new officer information and, if applicable, contact details.
- Website and social media account access should be transferred to appropriate officers as part of the transition.
- Modify any email distribution lists, internal contact databases, or organizational charts with the new officer information.

TRANSITION PART TWO:

OFFICER DEVELOPMENT PERIOD

TIMELINE

This begins immediately following the election session and continues through the next academic term, typically the Spring semester.

OBJECTIVE

To ensure a comprehensive knowledge transfer and systematic officer preparation for operational excellence.

This development period transforms newly elected officers into effective leaders through structured knowledge transfer, strategic planning, and ongoing professional development. The process emphasizes thorough preparation over quick handoffs, ensuring each officer begins their term with a complete understanding of their responsibilities and a clear strategic direction.

ELEMENT #1: INDIVIDUAL POSITION TRANSITIONS (1-2 WEEKS AFTER ELECTIONS)

The first part of the development period is a one-on-one transition meeting between the outgoing and incoming officer. This should be seen as a structured knowledge transfer session, and typically would last about 60-90 minutes per position. This structured approach prevents critical information gaps and establishes clear performance expectations.

Pre-Meeting Preparation:

Both outgoing and incoming officers should complete position-specific preparation worksheets before their transition meeting. These worksheets ensure all critical topics are covered and help structure the conversation for maximum effectiveness.

- *Outgoing Officer Worksheet:* Reflection on role responsibilities, key relationships, challenges faced, successful strategies, and recommendations for improvement
- *Incoming Officer Worksheet:* Questions about role expectations, specific concerns, learning priorities, and initial goal-setting thoughts

Transition Meeting Focus Areas:

- *Operational Overview:* Role calendar, responsibilities, deadlines, and budget management.
- *Systems and Resources:* Digital tools, file organization, passwords, and administrative system access.
- *Relationships and Communication:* Overview of key contacts, stakeholder management, and collaboration protocols.
- *Strategic Insights:* Lessons learned, proven approaches, challenges to anticipate, and improvement opportunities

Required Deliverables:

- Updated position handbook with current procedures and protocols
- Complete contact directory with relationship context and communication preferences
- Calendar integration with all critical dates and recurring commitments
- Secure transfer of digital access and file organization systems

ELEMENT #2: LEADERSHIP TEAM INTEGRATION (FIRST MONTH AFTER ELECTION)

The newly elected officer team should meet for an orientation session focused on basic coordination and identifying areas where they'll need support. If they are electing at the end of a Fall term as recommended, it should also cover Regional Leadership Academy (RLA) preparation and attendance. Expect this to take about 60 minutes.

Session Objectives:

- Handle basic housekeeping and coordination needs.
- Ensure all officers register for the January Regional Leadership Academy.
- Identify potential challenge areas that may need to be incorporated into action planning during RLA.
- Understand the expected officers who must complete online officer training modules prior to checking in on site at RLA.
- Establish basic communication and meeting structures.

Basic Coordination and Housekeeping (15 Minutes)

- Set regular officer meeting schedule
- Establish primary communication channels (group chat, email, etc.)
- Review shared calendar and major upcoming events (check the Operational Dates and Deadlines document for this section)
- Discuss any immediate chapter needs or concerns

Regional Leadership Academy Registration (15 Minutes)

- Complete RLA registration for all officers and hotel confirm roommate assignments
- Review RLA schedule and logistics
- Assign responsibility for coordinating travel
- Discuss expectations and learning goals for RLA

Officer Training Module Planning (10 Minutes)

- Review required officer modules for each position
- Set deadlines for completing modules before RLA
- Create accountability system for module completion
- Address any technical issues with accessing training materials

Challenge Area Identification (15 minutes)

- Each officer identifies one or two areas where they anticipate needing help
- Discuss common challenges from previous years
- Brainstorm questions to ask other chapters at RLA
- Plan to use RLA networking opportunities for problem-solving

Spring Semester Next Term Planning (5 minutes)

- Review major events and deadlines for the next semester/quarter
- Identify any immediate action items
- Plan follow-up meeting after RLA with detailed planning

ELEMENT #3: ONGOING DEVELOPMENT AND STRATEGIC IMPLEMENTATION

Following the initial transition pieces, officers should continue to engage in learning and development, taking advantage of the following set events and sessions:

Regional Leadership Academy

Newly elected officers attend Regional Leadership Academy to:

- Develop comprehensive understanding of organizational best practices and leadership principles, while connecting to the “big picture” of Delta Chi.
- Acquire specialized training in their specific officer responsibilities and advanced leadership techniques
- Create goals for their positions and action plans for their chapters
- Build networking relationships with officers and members from other chapters for ongoing peer support

Officer Retreat

Following Regional Leadership Academy attendance, the officer team should conduct a comprehensive strategic retreat. This dedicated planning session allows officers to integrate their learning and review the action plan they set during the event.

They should use this time to finalize goals for their positions and develop operational plans for the upcoming semester. The retreat should provide focused time away from daily distractions to align on priorities and establish clear expectations for the officer team's collaborative work throughout their term.

One-on-One Transitions: Crafting Tomorrow's Leaders

The officer transition one-on-one is your most critical investment in preserving institutional knowledge and ensuring seamless leadership continuity. This isn't just a handoff meeting—it's the strategic foundation that converts years of experience into immediate effectiveness for incoming officers.

WHY THIS MEETING IS ESSENTIAL

The officer transition one-on-one helps your chapter:

- Transfer relationship dynamics and institutional knowledge that took months to build
- Convert real experience into actionable insights for immediate success
- Preserve critical processes and connections that aren't documented anywhere
- Establish clear expectations and eliminate costly misconceptions
- Create continuity that maintains chapter momentum during leadership changes

When conducted strategically, this meeting empowers incoming officers to hit the ground running instead of spending months learning through trial and error.

STRATEGIC TIMING AND COMMITMENT

As mentioned in the Transition Part Two section, these meetings should last about 60-90 minutes. Meaningful knowledge transfer cannot be rushed. Outgoing and incoming officers for each position should meet together very shortly after elections are held, and if electing on the recommended timeline, prior to attending Regional Leadership Academy.

PRE MEETING PREPARATION

Both outgoing and incoming officers should complete position-specific preparation worksheets before their transition meeting. These worksheets ensure all critical topics are covered and help structure the conversation for maximum effectiveness.

Outgoing officers should also gather any necessary documents or resources they want to give to the incoming officer, while incoming officers should begin to review documents available through IHQ, including their position description and BRIEF, as well as chapter bylaws or governing documents.

TRANSITION MEETING AGENDA

Below is a sample agenda of topics to cover during this meeting between the incoming and outgoing officer.

REALITY CHECK AND ALIGNMENT (20 MINUTES)

- Walk through day-to-day reality vs. expectations.
- Officers align on actual position requirements and identify critical impact areas
- Review the prepared worksheets together

KNOWLEDGE AND RELATIONSHIP TRANSFER (30 MINUTES)

- The heart of the meeting - share chapter insights, key contact information, and valuable resources.
- Honestly discuss opportunities and challenges ahead.

LOGISTICS AND PROCESS HANDOFF (20 MINUTES)

- Transfer documents, credentials, and system access
- Provide information on ongoing projects with next steps
- Facilitate introductions with any key contacts

STRATEGIC PREPARATION AND NEXT STEPS (15 MINUTES)

- Address specific incoming officer questions
- Share mistakes to avoid and lessons learned
- Identify immediate pre-RLA priorities
- Establish ongoing communication plan

SUCCESS OUTCOMES

A strategic officer transition produces:

- Immediate operational effectiveness without learning curve delays
- Preserved relationships and institutional knowledge continuity
- Clear understanding of real challenges and proven solutions
- Strong foundation for RLA goal-setting and strategic planning
- Ongoing mentorship connection for complex situations

CRITICAL SUCCESS FACTORS

- **Honesty:** Outgoing officer shares real experience—what worked, what didn't, and why
- **Preparation:** Both officers arrive with completed worksheets and specific questions
- **Environment:** Choose space that facilitates focused conversation without distractions
- **Follow-Through:** Confirm all transfers completed and establish ongoing communication

THE BOTTOM LINE

Chapters that invest in strategic officer transitions see faster leadership effectiveness, stronger institutional continuity, and reduced officer burnout. This meeting transforms leadership changes from disruptive gaps into seamless progressions that accelerate chapter excellence.

Officer Retreat:

Blueprinting Your Brotherhood's Success

An officer retreat is your most critical investment in transforming inspiration and action plans from RLA into measurable chapter success. This isn't another meeting - it's the strategic bridge that converts individual officer energy into unified execution with lasting impact.

For complete session details and facilitation guide, reference the Officer Transition Retreat BRIEF.

WHY THIS RETREAT IS ESSENTIAL

An officer retreat helps your officer team:

- Convert action plans made during RLA goals into clear timelines and responsibilities.
- Build unified leadership approach that creates consistency and trust
- Establish accountability systems that ensure follow-through throughout the year
- Strengthen officer relationships and collaborative problem-solving skills

When conducted strategically, this retreat empowers your chapter to execute with excellence instead of letting RLA energy fade into good intentions.

STRATEGIC TIMING AND COMMITMENT

WHEN

If elected on a calendar year cycle, this should be held one to three weeks after RLA (January - February timeframe). If electing on an academic year cycle, this should be held as close to the start of the Fall semester as possible (and may happen before).

DURATION

Five to Six hours minimum. Meaningful strategic work cannot be rushed!

ESSENTIAL PARTICIPANTS

- All executive officers: "A", "B", "C", "D", "E", "F"
- Associate Member Counselor and Recruitment Chair
- Committee Chairs (ex. Scholarship Chair)
- "BB" - Chapter Advisor
- Available Alumni Board of Trustees members

OFFICER RETREAT AGENDA

RLA Integration & Leadership Alignment (25 Minutes)

- Transform individual RLA experiences into shared leadership mindset.
- Officers align on execution approach and identify common themes before diving into detailed planning.

Strategic Goal Execution Planning (90 Minutes)

- The heart of the retreat - convert RLA goals and action plans into specific implementation step and clear role assignments
- Identify resource requirements, obstacle analysis, and immediate next actions.

Support Systems & Accountability (60 Minutes)

- Build infrastructure for success through advisor partnerships or peer accountability systems.
- Establish regular check-ins and collaborative problem-solving processes.

Leadership Philosophy Development (45 Minutes)

- Create shared leadership philosophy that guides decision-making and builds member trust throughout the year.

SUCCESS OUTCOMES

A strategic officer retreat produces:

- Executable action plans with specific deadlines and clear ownership
- Unified leadership philosophy that guides all officer decisions
- Strong accountability systems for tracking progress and mutual support
- Enhanced officer team cohesion and reduced leadership conflicts
- Immediate implementation pathway that maintains RLA momentum

CRITICAL SUCCESS FACTORS

- **Environment:** Choose space that facilitates focus—comfortable seating, wall space for visuals, minimal distractions, breakout capability
- **Preparation:** Officers arrive with RLA materials, personal leadership goals, and position-specific challenges identified
- **Follow-Through:** Schedule post-retreat actions within 24 hours, including first accountability check-ins

THE BOTTOM LINE

Chapters that invest in strategic officer retreats see higher goal achievement, stronger leadership teams, and sustained chapter excellence. This retreat transforms officer groups from individuals with separate responsibilities into unified leadership teams with shared vision and execution capability.

Appendix:

Leadership Interest Form

The Leadership Interest Form (LIF) is a supplemental tool designed to help Delta Chi chapters identify, support, and prepare brothers interested in pursuing officer roles prior to the formal nomination and election process. While not required, chapters are strongly encouraged to use this form as part of their elections timeline to promote transparency, encourage reflection, and strengthen leadership pipelines.

WHEN TO USE THE LEADERSHIP INTEREST FORM

Chapters should introduce and distribute the LIF during the Chapter Meeting #1 - Election Kickoff Meeting. Interested members may complete and submit the form either digitally or in print. Chapters should set a clear deadline for submission, ideally 5-10 days after the kickoff meeting, so there is time to support potential candidates and review responses.

HOW TO USE THE LEADERSHIP INTEREST FORM

The “B” is responsible for collecting completed forms and ensuring they are stored and accessible (email, chapter shared drive, etc.). Officers should use the submitted forms to:

- Guide conversations with interested candidates.
- Clarify roles and expectations prior to nominations.
- Inform outgoing officers for mentorship or transitional support.

Chapters may choose to allow members to view submitted LIFs prior to elections to better understand each candidate’s interest and relevant experience.

SUBMITTING THE LEADERSHIP INTEREST FORM

Members may submit their completed LIF:

- By email: Attach the form (and optional résumé/overview) to the chapter “B”.
- In print: Turn in the form (and any optional attachment stapled) directly to the “B.”

See the next page for a sample form.

Leadership Interest Form

This form allows members to formally express interest in running for a chapter officer position, demonstrate their understanding of the role, and begin intentional preparation ahead of elections. It supports thoughtful candidacy and helps current officers connect with and mentor potential successors.

INSTRUCTIONS FOR MEMBERS

Complete this form thoughtfully and submit it to the “B” by the deadline announced during the Election Launch meeting. You are strongly encouraged to schedule a one-on-one meeting with the outgoing officer for each position you’re considering.

SECTION ONE: CANDIDATE INFORMATION

Full Name:

Graduation Year:

Phone Number:

E-mail Address:

Current Class Rank: Freshman Sophomore Junior Senior

Major(s):

Minor(s):

Other Time Commitments
(jobs, leadership roles, etc.):

SECTION TWO: POSITIONS OF INTEREST

List up to three positions you’re considering in ranked order of interest.

1. _____

2. _____

3. _____

Have you reviewed the position description(s) on the Delta Chi website? YES NO

Have you reviewed the chapter bylaws related to elections and officer responsibilities?
YES NO

SECTION THREE: MOTIVATIONS AND GOALS

Why are you interested in this/these position(s)?

What skills, experiences, or qualities make you a strong candidate for this role?

List 2-3 specific goals or improvements you would pursue in this role:

What are 1-2 challenges you anticipate in the position, and how would you prepare to address them?

SECTION FOUR: PREPARATION COMMITMENT

Initial next to each statement, sign this form, and submit it to the "B" for processing.

_____ I commit to meeting with the outgoing officer of each role I'm exploring before nominations.

_____ I understand that candidacy includes preparing a campaign speech and answering questions from members during the election.

_____ I understand the time commitment and will prioritize this role alongside my academic and personal responsibilities.

_____ I am prepared to uphold Delta Chi's values through my candidacy and, if elected, through my term of service.

Signature: _____

Date: _____

OPTIONAL ATTACHMENT: You may include a résumé or brief overview of your leadership experience. If submitting this form via email, attach it as a separate file. If submitting in print, staple or paper clip this document with your LIF.