

## Executive Board Transition Guide

### Overview

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An effective officer transition program can ensure leadership continuity. An effective transition period allows an executive board to establish a strong foundation for their terms in office and helps leaders build upon current successes while examining areas for improvement.

Implementing an officer training program is the responsibility of both the outgoing executive committee members and the incoming executive members. When elections are held at least one month before formal leadership transitions, this allows time for all three components of an effective transition:

- 1) Officer-to-Officer Transitions
- 2) Team-to-Team Transitions
- 3) Incoming Executive Board Goal-Setting

The following resource has been designed to assist chapters in implementing an officer transition program in their chapter.

### Who Should Be Involved in an Officer Transition Program?

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The outgoing and incoming executive board members of a chapter must be involved in the transition process.

#### Key officers to include:

- ▶ President
- ▶ Vice-President(s)
- ▶ Treasurer
- ▶ Secretary
- ▶ New Member Educator
- ▶ Scholarship Chair
- ▶ Community Service Chair
- ▶ Philanthropy Chair
- ▶ Risk Manager
- ▶ Social Chair
- ▶ Ritual Chair
- ▶ Historian
- ▶ House Manager (if applicable)

#### Key Constituents to include:

- ▶ Chapter Advisor
- ▶ Organization Headquarters (if applicable)
- ▶ House Corporation (if applicable)
- ▶ UVA Fraternity & Sorority Life

## **What Materials Should be Included in a Transition Packet?**

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**Updated Constitution, Bylaws, Chapter Policies, & Procedures:** This information is integral in the transition process – many procedural and responsibility questions will likely be answered through these documents.

**Officer Job Description:** While some job responsibilities may be articulated through the chapter's constitution and bylaws, outgoing officers should still write out their own officer job description. It might also be helpful to map out the term and times of the year that are particularly busy for the officer. Officers should also include an evaluation in this description to highlight areas of success, challenge and opportunity for the position (see [Officer Transition Worksheets](#) document for a template).

**Risk Management Plans:** These are living documents that can always be updated during an officer transition. Outgoing and incoming officers should ask: What worked well with these plans last year? Where there any fire/medical/police incidents over the previous year? What could be improved?

**University Policies & Information:** Each new officer should become familiar with the rules and regulations that affect their chapter. In particular, chapters should review:

- ▶ [Fraternal Organization Agreement \(FOA\)](#)
- ▶ [How To Reserve Space on Grounds](#)
- ▶ [Event Management Guidelines and Alcohol Risk Management](#)
- ▶ Contact Information for [Fraternity & Sorority Life](#)

**Governing Council Information:** Each new officer should become familiar with the constitution and bylaws of the governing council (IFC, ISC, MGC, NPHC) as well as gather the contact information for the officers of each council.

**Financial Records:** Gather budgets from previous years and understand how chapter funds have been used over the past few years. Outgoing and incoming officers should ask: Where are the vast majority member dues spent?

**Inter/National Headquarters Information:** All officers should be provided with information about their inter/national organization. This should include paperwork deadlines for the national organization as well as key contacts.

**Contact Information:** Officer information will need to be updated on various levels. For example, it is important to ensure that the appropriate officer is listed as the contact for mail, the chapter website, the chapter bank account, etc.

Additionally, a master list of key contacts should be compiled and shared among officers. Key contacts should include:

- ▶ Chapter Advisor
- ▶ UVA Fraternity & Sorority Life
- ▶ Inter/National Headquarters (if applicable)
- ▶ Housing Corporation
- ▶ Police, Fire, Safety
- ▶ Other people who can support officers

## Officer Transition Retreat: A Sample Program Outline

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The following is a sample retreat outline that can be modified and adapted to meet your chapter's needs. The overall retreat will occur in three distinct parts:

- ▶ Part 1 provides an opportunity for outgoing and incoming officers to meet to discuss specific officer related roles and responsibilities.
- ▶ Part 2 focuses on a discussion on the past executive board's term in office
- ▶ Part 3 is a strategic planning session for the incoming executive board.

### Introduction

15 Minutes

The Lead Facilitator(s) (usually chapter advisor or outgoing chapter president) will begin by welcoming the officers to the transition retreat. The Lead Facilitator (LF) will review the key objectives for the training retreat:

- ▶ Review the duties and responsibilities of the individual officers and the Executive Committee as a whole.
- ▶ Review the past officer's term to discuss areas of success and challenge.
- ▶ Discuss the current state of the chapter, as well as the long-term vision and goals for the chapter.
- ▶ Incoming officers will set goals and a calendar for their term in office.

### Part 1 – Officer-to-Officer Transition

1 hour

The first part of the officer transition retreat will provide an opportunity for incoming and outgoing officers to meet and to discuss specific officer information. Officer notebooks as well as essential materials should be transferred during this time. *The officer-to-officer transition can also be supplemented with additional meetings before or after the retreat.*

This is an opportunity for outgoing chapter officers to have some closure with their role and ensure continuity during the transition to incoming officers.

There are several questions that should be discussed between officers. Prior to the retreat, the LF can create a handout which provides such discussion prompting questions:

- ▶ What was the outgoing officer's transition like when they took office?
- ▶ What information did the outgoing officer wish s/he knew when they took office?
- ▶ How could the outgoing officer have been better prepared?
- ▶ Where did the officer succeed in their position?
- ▶ What were the greatest mistakes and lessons learned during the officer's term in office?
- ▶ What paperwork/deadlines are required of the specific officer?
- ▶ What supplies are necessary for the officer to succeed in their position?
- ▶ What items/programs/projects are still outstanding?
- ▶ What role did the outgoing officer play on the greater executive committee?
- ▶ What key relationships did the officer build? Which relationships still need to be built?

## Part 2 – Team-to-Team Transition

1 hour

The second part of the officer transition retreat will provide an opportunity for the outgoing executive board to share information about their term in office. This portion of the retreat should particularly focus on how the executive board functioned as a team.

In addition to addressing any specific questions posed by the incoming executive board, the LF should be prepared to ask specific prompting questions that can include the following:

- ▶ What are the current issues facing the executive board?
- ▶ What projects or goals have not been fulfilled? What is the status of these projects or goals and what are next steps for fulfilling?
- ▶ How did the executive board function as a team? How did members of the board communicate with one another?
- ▶ How did the executive board support other executive board members?
- ▶ How did executive board members hold one another accountable to the organization's standards and goals?

Before the outgoing officers leave the retreat, they should be recognized for their service and work. This would be a great opportunity to facilitate an activity where each outgoing team member can share final words of wisdom and advice.

This might also be a good time to break for lunch.

## Part 3 – Incoming Board Goal-Setting

1-2 hours

The final part of the officer transition program will focus on the incoming executive board. This is specifically a time for goal-setting for the executive board as well as setting a calendar for the upcoming semester.

LF leads the group in a goal-setting session:

LF should clarify that goals provide direction, describe success, provide challenge, create common tasks and purposes, create expectations, etc. Goals help us focus our efforts. They are a specific statement of what is most important. They allow you to break down big plans into manageable tasks that keep you from being overwhelmed.

Consider SMART goals:

**S:** Specific - Specific goals state exactly what you want to accomplish.

**M:** Measurable - Measurable goals state what you want and when you want it. They enable you to measure your progress at any point along the way.

**A:** Action-Oriented - Action Oriented goals indicate how they will be achieved. They specify what you need to do to reach your goals.

**R:** Realistic - Realistic goals are possible. They are attainable, considering the resources and constraints relative to the situation.

**T:** Timely - Timely goals allow reasonable time to achieve them, but not so much that you lose focus or motivation.

**Take time to look one year into the future:** What do incoming officers hope has happened in their chapter? Provide a few minutes of silent reflection or take notes on what they the chapter has accomplished.

LF writes each idea on large Post-It notes/dry erase board. Each participant should be sharing multiple accomplishments or achievements. The LF can synthesize related issues into a few areas of focus.

After participants have shared, LF should instruct the group to decide on their top 3-5 goals/most important areas of focus for the coming year. *Remember that these goals should be informed by the outgoing executive board's reflections.*

Once the group has decided on their top 3 goals, the facilitator can have officers use the Chapter Goal-Setting worksheet below to outline the issue they hope to address, ideas for addressing the issue, action steps, and deadlines. To keep a record of these worksheets, it might be best to complete on a computer (rather than hand-written) – you can also

**Consider closing the retreat by scheduling the next executive board meeting. You may also use this time to discuss a meeting schedule for the next semester and establish communication expectations.**

# CHAPTER GOAL-SETTING

ISSUE TO ADDRESS: \_\_\_\_\_

BRAINSTORM ALL POSSIBLE WAYS TO ADDRESS THE ISSUE:

**GOAL STATEMENT:**

What do you hope to accomplish by addressing this issue?

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(Continue with Action Steps on the next page)

# PLAN OF ACTION

|                          | Specific Action | Who?  | Date to Be Completed By: |
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