

**TRIANGLE FRATERNITY**

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## **OFFICER TRANSITION AND TRAINING GUIDE**

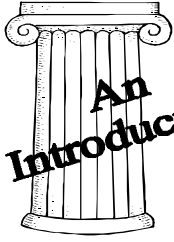
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# OFFICER TRANSITION AND TRAINING GUIDE

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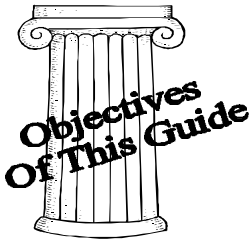
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## OFFICER TRANSITION AND TRAINING



Organizations, and student organizations in particular, undergo constant change. One predictable change every group faces, though, is the change in leadership. The annual election of new officers is, presumably, (a) scheduled for the same month, (b) involves the same set of positions, and (c) is done in a consistent manner. These characteristics alone make officer elections and the inherent transition easier for student organizations and the individual officers.

Just as with officer transition, the anticipation and guaranteed need for officer training can make it easier than most organizations make it appear. The needs and purpose of training, however, require added considerations, which do make planning slightly more difficult. By design, training can be used to: (a) educate officers on areas pertinent to their offices, as well as the organization, (b) create a cohesive group, and/or (c) train officers on skills pertinent to their position.



In reviewing this guide, you will:

- ▲ learn a step-by-step process for officer transition
- ▲ get some ideas on building an effective team of officers
- ▲ learn how to help prepare resources for the next president



This Officer Transition and Training Guide is designed as a step-by-step tool primarily for newly elected officers, complete with forms, goal-setting tips, and suggestions for officer training workshops. Let's start by first looking at officer transitions and officer training.

### Officer Transition v. Officer Training

Officer transition and officer training are not the same. Officer transition is the passing of information, records, suggestions, and responsibilities from out-going to newly-elected officers. These have nothing to do with training an officer how to do their job. They do, however, have everything to do with providing newly-elected officers with the tools needed to do the job. It is through training that they gain the education and skills to do the job effectively.

#### Officer Transition

- ▲ transfer of records and supplies
- ▲ transfer of knowledge
- ▲ transfer of responsibility

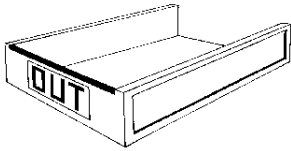
#### Officer Training

- ▲ education about the organization
- ▲ education on the position
- ▲ learning organization-based skills
- ▲ learning position-based skills

## OFFICER TRANSITION: A CHECKLIST



The following is a condensed checklist of tasks, in chronological order, out-going and newly-elected officers should complete. Depending on national, organizational, or campus policies governing your position and duties, some tasks may need to be completed at a specific time or by a specific date.



### OUT-GOING OFFICERS

#### *Before the Election . . .*

- update activity and project reports
- update officer manual
- update inventory of records and supplies
- complete organizational assessment
- complete position assessment

#### *Within One Week After the Election*

- assist new officer(s) with announcement
- assist new officer(s) with pertinent forms
- assist new officer(s) with financial forms
- transfer records and supplies

#### *Within Two Weeks After the Election . . .*

- attend officer installation ceremony
- meet with newly-elected officer

#### *Within One Month After the Election . . .*

- assist with officer training session
- assist in goal-setting

#### *Within Three Months After the Election . . .*

- assist new officer review personal goals



### NEWLY-ELECTED OFFICERS

#### *Before the Election . . .*

- review role/responsibilities of position
- discuss position with current officer

#### *Within One Week After the Election . . .*

- announce change of officers
- complete necessary forms
- change names on financial accounts
- obtain updated officer manual
- obtain records and supplies

#### *Within Two Weeks After the Election . . .*

- officer installation ceremony
- meet with other new officers (as a group)
- review responsibilities of position again
- review activity and project reports
- meet with out-going officer
- meet with advisor(s)
- review chapter and position budget

#### *Within One Month After the Election . . .*

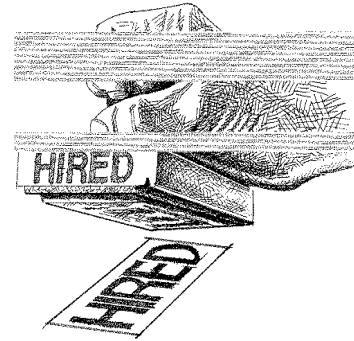
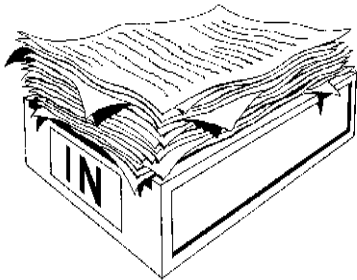
- officer training session
- establish goals
- meet with campus officials

#### *Within Three Months After the Election . . .*

- review personal and organizational goals

# TAKING OFFICE

## Preparing for the Transition



First and foremost, understand that a transition cannot take place over a single night or weekend, but involves a series of discussions and workshops. It is equally important to understand that from the first day in office each and every officer must begin to plan for the inevitable transition that will come from their leaving office.

As you take the oath or conduct officer transition and training workshops, there are a few simple tasks that must be completed. Refer to the preceding checklist and mark off each item as its completed, indicating the date completed. Refer to the Inventory of Records and Supplies -- making sure you or another incoming officer has secured each of the items listed.

A DETAILED PLAN FOR NEWLY-ELECTED OFFICERS



**Review Role/Responsibilities of the Position.** Don't accept a position unless you fully understand the responsibilities. You may not completely understand everything until well into your term, but accepting a position without first reviewing the job description is asking for failure.

▲ **Discuss the Position with the Out-Going Officer.** Ask the current officer their perspective on the position and the factors they faced in getting the job done. You may want to ask them about . . .



- the three most important or largest responsibilities associated with the position.
- the amount of time necessary to complete those tasks.
- the most difficult responsibilities of the job.
- factors making it difficult to complete tasks (lack of time and money, resistance from others, etc.).
- the most rewarding accomplishments of the past year.
- goals they would set for themselves if they had the position for another year.
- things they would do differently.



**Announce Change of Officers.** Distribute a press release/correspondence announcing the election of new officers, particularly the executive positions. Distribute this notice . . .

*To the Organization*

- \_\_\_ National Headquarters
- \_\_\_ Division/Regional President
- \_\_\_ Alumni Organization President
- \_\_\_ House Corporation President

*You've Just Been Elected – Send Out the Good News!*

*To the Campus*

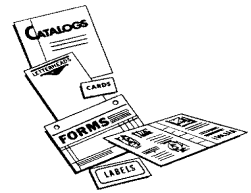
- \_\_\_ College/University President
- \_\_\_ Campus Police Chief
- \_\_\_ Greek Advisor
- \_\_\_ Student Organizations



*To the Community*

- \_\_\_ Police Chief
- \_\_\_ Neighborhood Representative(s)
- \_\_\_ Mayor
- \_\_\_ Chamber of Commerce

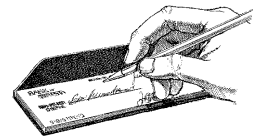
- ▲ **Complete Necessary Organizational/Officer Forms.** Complete and submit, among others, the Chapter Officer Roster Form, which requests address information on the organization’s officers. Distribute this form to the individuals/offices listed below, and be sure to ask if they need information not listed on the form.



- \_\_\_ National Organization/Headquarters
- \_\_\_ Alumni Officers/House Corporation
- \_\_\_ Campus Officials (Greek Advisor)
- \_\_\_ Campus Organizations (Student Senate, Greek Council, etc.)

Do not forget to also complete the Officers’ Agreement, a copy of which is included in this guide, as well as the Chapter/Organizational Profile. The individuals/offices listed above (particularly those on campus), may not be at all familiar with the organization and its history, philanthropic efforts, or timing of elections. This is a good time to educate them. They may even inquire about the chapter’s charity events or attend an anniversary or alumni gathering.

- ▲ **Change Names on Financial Accounts.** Compose a letter (on organization letterhead) indicating a change in officers has occurred and forward it to the financial institution(s) where the organization’s accounts are located. Indicate who no longer has authority to sign financial documents and who now has this authority. Be sure to include the social security number, title, and local address of each individual.



- ▲ **Obtain Updated Officer Manual.** Note to all chapter officers: don’t let this one go to chance. Request that each out-going officer bring their officer manual either to the chapter meeting at which elections occur or the following meeting; even if it’s not updated.

- ▲ **Obtain Records and Supplies.** First and foremost, get the necessary manuals, reports, supplies, etc. from the out-going officer. Be sure to get the information/items listed on the Inventory of Records and Supplies included in this handbook. As a priority, you should obtain a copy of the organization’s constitution and bylaws and a full description of the role and responsibilities of your position. If you do not receive all materials at the same time, establish a deadline and meeting time at which you will receive the remaining materials.



**Officer Installation.** The following suggested format for is adapted from the National Bylaws.



Chapter officers shall be installed at a banquet or other suitably arranged function.

The retiring president shall appoint an installing officer, who shall be the senior past president or the senior and highest ranking past officer who is present, but who is not one of the newly elected officers.

**The Installation Ceremony**

The retiring president shall make a short address and then shall yield control of the meeting and official gavel to the installing officer. The installing officer shall request the newly elected officers to come forward and shall then administer the oath of office, collectively, to the new officers.

**The Oath of Office**

"I do solemnly swear (or affirm) that I will fulfill to the best of my ability the duties of my office and that I will at all times maintain the honor of TRIANGLE. So help me, GOD".

The installing officer shall then deliver a short talk, at the close of which he shall present the gavel to the new president and retire to the body of the meeting.

The new president shall make a short address of acceptance.

Any officer-elect who is not present for this installation shall take the oath at the next regular meeting of the organization or shall sign a copy of the oath and file the copy with the secretary.

▲ **Meet with Other Newly-Elected Officers (As a Group).** The primary focus of this meeting is two-fold; to ensure that each new officer has obtained the necessary officer manuals and records and to schedule and begin planning a more detailed officers' workshop.

▲ **Review Duties and Responsibilities.** Using the items you've obtained (above), review each for the specific rules, regulations, and responsibilities of your position. Start with the constitution and the officer manual for your position. As you conduct your review, prepare a list of questions you will want to ask the out-going officer about the mechanisms (operating practices) in place to assist you complete these duties. Also look for information about responsibilities the previous officer took on but are not listed as specific duties of the position (did the past officer take on responsibility for duties that others should have completed?).

▲ **Review Activity and Project Reports.** If done properly each officer should complete a record of activities and projects on a monthly basis during their term. This record, in the form of Officer Activity and Project Report and Chapter Activity/Event Reports, should at least offer a list of events the officer coordinated, a list of individuals with whom they worked to plan the events, and the costs of such events.

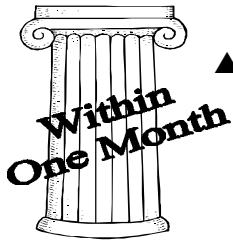
▲ **Meet with Out-Going Officer Again.** By this point in the transition, you should have plenty of questions for the out-going officer. Along with the questions noted in reviewing the records and supplies you have received, discuss with them your assessment of the organization and upcoming meetings, as well as suggestions they might have.



▲ **Review the Budget.** In addition to the figures that may or may not be in the Chapter Activity/Event Reports, you should review any other records of the budget/expense reports for both the chapter and the position.



- ▲ **Meet with Advisors (Chapter and Faculty).** It is highly recommended that you meet with chapter advisors (and campus officials if time permits) prior to any additional meetings with the new officers, particularly any goal-setting sessions that may be scheduled. This will give you an opportunity to get better acquainted prior to such meetings, as well as gain their perspective on the important responsibilities of your position. The advisors may also be able to share ideas with you in advance of a goal-setting session so that, if you agree with any ideas, you can present them and know that they'll support you. (Few advisors are interested in getting the credit for good ideas; most would feel better knowing that a chapter officer liked the idea enough to offer it as their own.)



- ▲ **Participate in Officer Training Session.** Don't assume you know all there is to know about the organization, the position, the campus, or the rest of the Greek community on campus. Take the time to learn new things, gain new skills, and meet new people. These skills and resources can come in handy over the next eleven months. Refer to the checklist on officer training later in this handbook to see which topics you think should be covered/addressed during training.

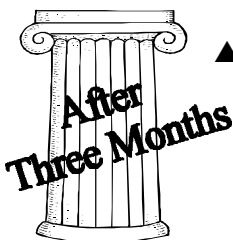
- ▲ **Establish Goals.** What direction do you want the organization go? Before the entire chapter can support your goals for the upcoming year, you must get the support of the other chapter officers. Setting explicit goals is arguably one of if not the biggest weakness of organizations.



goals should be s.m.a.r.t.  
 specific  
 measurable  
 attainable  
 realistic  
 timely

they should also be . . .  
 positively stated  
 reviewed at least semi-annually  
 determined/affirmed by the entire organization  
 used in assessment  
 written

- ▲ **Meet with Campus Official(s).** Whether or not you have set goals or met with chapter advisors to this point, it is a good idea to meet with campus officials such as the Greek Advisor and the Chief Student Affairs Officer. This will give you an opportunity to get better acquainted, as well as gain their perspective on the important responsibilities of your position. The campus advisor may be able to offer valuable resources specific to your position such as campus policies, a schedule of upcoming campus events, or simply a directory of other chapters' officers.



- ▲ **Review Personal and Organizational Goals.** Goals are useless unless they are achieved. It is unlikely they will be achieved if you don't monitor your progress on an on-going basis. The Goals and Objectives Report in this handbook can be utilized to monitor individuals' responsibilities and deadlines.

**GOOD LUCK**

**active chapter officers listing**

**chapter/organizational profile**

## **chapter officer agreement**

**inventory of records and supplies**

## OFFICER TRAINING



The following is a list of suggested topics for officer training. Some are referenced as education or information-based (i.e. learning constitutional policies), and others are developmental or skill-builders (team-building, conflict resolution skills, how to plan a philanthropy). An effective training session will not attempt to cover all topics, but rather a few pre-selected priorities. Others can, and should be, addressed by the entire chapter on an on-going basis.

### **National Organization**

- organizational structure
- constitutional policies and procedures
- mission statement and stated values
- judicial policies and procedures
- history and traditions

### **Local Organization**

- organizational structure
- constitutional policies and procedures
- mission statement and stated values
- judicial policies and procedures
- history and traditions

### **Campus**

- who's who - key university officials
- recognition standards
- funding requirements
- judicial policies and procedures

### **Community**

- who's who - key officials
- schedule of large community events

### **Organizational Development**

- decision-making
- team-building
- meeting management
- program planning
- goal-setting
- conflict resolution

### **Leadership/Skill Development**

- time management
- stress management
- networking
- filing and recordkeeping
- parliamentary procedure
- conflict resolution
- goal-setting
- applying values to decision-making

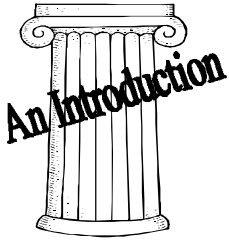
### **Executive Board Development**

- motivating the members
- dealing with dissention from membership
- budgeting

### **Officer Development**

- role and responsibilities of position

## BUILDING AN EFFECTIVE TEAM



In 1970, the rumors about the breakup of the Beatles were finally confirmed. When Paul McCartney announced he was leaving the group, the world's most successful rock-and-roll band was no more. Well; all groups, whether the Beatles, a construction crew, a high school football team, or a fraternity executive board, share an important characteristic – they change.

The following page is an overview of how groups develop and the process they go through. From this, you may be able to use initiatives or ideas to address particular issues as the new chapter president.

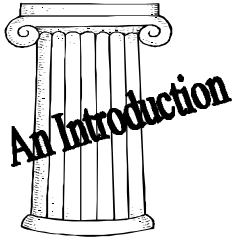
Be sure to also ask your advisors or the campus Greek Advisor for team-building suggestions.



### **What Is A Team?**

A team is a group of people, each of whom possesses particular expertise; each of whom is responsible for making individual decisions; who together hold a common purpose; who meet together to communicate, collaborate, and consolidate knowledge.

**GROUP DEVELOPMENT**



The table below illustrates one theatrical model of group development and the stages groups go through in their life. It is not universal and can not be applied equally to all groups. It is intended, however, to offer some insight into the challenges you and your group of officers might face. Your job is to understand this probable process of group development; not to control it.

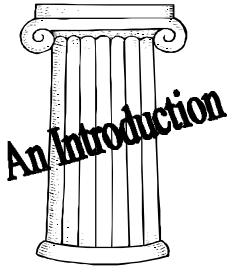
For example, you should not get down on the group just because they are tentative to get to work right away or that officers may begin to express disagreement over decisions and how to do things in the chapter. This is normal. It happened last year, and it's going to happen next year. Your role as leader is to facilitate

**Stages of Group Development**

Stage	Major Processes/Activity	Characteristics	Key Interventions/Strategies
1. Orientation (forming)	Exchange of information; increased interdependency; task exploration; identification of commonalities	Tentative interactions; polite discourse; concern over ambiguity and uncertainty	Clarify position descriptions and responsibilities; get to know each other on a personal level
2. Conflict (storming)	Disagreement over procedures; expression of dissatisfaction; emotional responding; resistance	Criticism of ideas; poor attendance; hostility; polarization and coalition forming	Clarify authority; clarify individuals' roles and responsibilities to the group
3. Cohesion (norming)	Growth of cohesiveness and unity; establishment of roles, standards, and relationships	Agreement on procedures; reduction in role ambiguity; increased "we-feeling"	Assess group's efficiency; ask yourself what you can do to accomplish more
4. Performance (performing)	Goal achievement; high task orientation; emphasis on performance and production	Decision making; problem solving; mutual cooperation	How can you bring about a significant change within the chapter?

Source: Forsyth, D. R. (1983). Group Dynamics, 2<sup>nd</sup> Edition.

## THE OFFICER WORKSHOP



First and foremost, there should be no such program as an officers' retreat. "To retreat" is to give up, to move back from one's position. Whether the workshop is for the entire chapter or the executive board, it should assist you in moving forward.

The primary factor in establishing an agenda is the goal of the workshop. What do you want to accomplish during the workshop? What type of training/education or decision-making is desired?

An Officers' Workshop can take many shapes and sizes. One workshop format is to have officers gather for an all-day and night session at a site outside of the chapter home and off-campus. These sessions are certain to provide ample time for training as well as planning, but may only be feasible if individuals' schedules permit and a suitable facility is available at the right price.

Another format for a new officers' workshop or training sessions is to conduct a series of pre-scheduled programs. The first program may be a review to ensure all new officers have the appropriate resource guides (see Inventory of Records and Supplies) or it may be a dinner or small social gathering for new officers and their girlfriends or significant others.

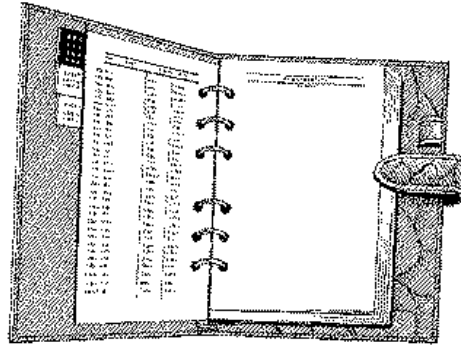
Ideally, an officers' workshop could enable officers to . . .

- identify and get problems out in the open
- promote communication and cooperation among members
- establish common goals and objectives
- lead to positive resolution of current problems
- solidify the philosophy and direction of the organization

Ideally (and realistically), an officers' workshop should have . . .

- ▲ **specific learning objectives**  
What do you want members to learn or gain from the workshop? Think about what you want the officers to remember about the program/event.
- ▲ **sense of purpose**  
Don't simply tell new officers to write down a date on their calendar, tell them it's mandatory, and then expect them to be excited about the event. Give them a sense of the purpose of the program, or better yet, allow them to participate in this decision.
- ▲ **bonding and brotherhood**  
One of the most important aspects of a program for officers or the entire chapter is to rebuild friendships and to remind members why they joined the organization.
- ▲ **sense of accomplishment**  
Give yourself a realistic list of goals for the program. It is better to end with a sense of achievement, albeit small, than a huge disappointment.
- ▲ **follow-up**  
Don't forget to follow-up on the goals and decisions made during the program. Give yourself a specific timeline and structure through which you'll monitor your progress.

## THE OFFICER WORKSHOP



The following information is provided more as a list of items officers may wish to cover during a workshop and an approximate number of minutes each item might require. It is not a complete list, and may not be listed in the most appropriate order for the individual group.

---

### Introductions

Be sure to introduce any guests. Officers should also introduce themselves to the guests, even if you believe the officers know the guests.

### Review Goals of Workshop (10 minutes)

Note: This is not a time to debate or change the goals or timeline of the retreat. They must stay as planned. If officers wish, plan a separate meeting to discuss critical issues that have surfaced.

### Icebreaker and/or Team-Building Exercises (10-40 min.)

Officers may not know one another as well as they think. Have an outside facilitator conduct personality profile or leadership style instruments or decision-making or communication exercises. It is important that this goes beyond the surface of individuals' hometown, major, etc.

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### Group Development

#### Establish Expectations of Officers and Members (15-45 min.)

Comparable to getting a new roommate, officers must establish early a certain level of expected behavior from one another. An accompanying worksheet, entitled "Group Norms," can assist with this.

#### Establish Expectations of Advisor (10-20 min.)

Just as officers establish expectations among themselves, they also let advisors know what they expect of them and what advisors should expect of the officers. Another accompanying worksheet, entitled "Member-Advisor Relationship: Establishing Expectations" can facilitate this process.

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**Policies and Procedures**

**Review Organizational Policies and Procedures** (20-40 min.)  
Constitution and Bylaws, Calendar of Programs and Deadlines

**Review Campus Policies and Procedures** (20-30 min.)  
Facility Scheduling, Reports and Forms, Event/Program Planning, Financial Guidelines

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**Operating Policies and Standards**

**Meetings and Parliamentary Procedure** (30-45 min.)  
Announcing Meetings, Meeting Environment, Making Motions, Taking Minutes,  
Evaluating Meetings

**Officer Reports** (10-15 min.)  
Verbal v. Written Reports in Chapter Meetings, Monthly Reports, Committee Reports, etc.

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**Strategic Planning**

**Establish Organizational Goals and Objectives** (45-75 min.)  
Affirm Organizational Mission and Purpose  
Determine Priorities  
Establish Objectives and Tasks Relative to Goals

**Establish Personal Goals and Objectives** (20-40 min.)  
Affirm Role/Responsibilities of Position  
Determine Priorities  
Establish Objectives and Tasks Relative to Goals

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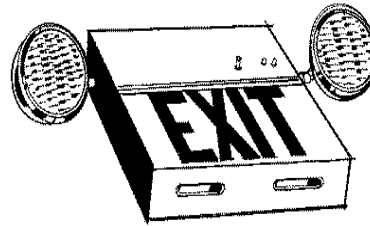
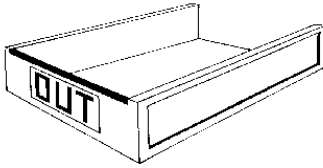
**Closing**

**Establish Timeline/Deadline for Follow-Up Workshop** (5-10 min.)

**Evaluate Workshop** (5-10 min.)  
Conduct Written Evaluation

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## LEAVING OFFICE



### A PLAN FOR OUT-GOING OFFICERS



Are you leaving office soon, and seeing this handbook for the first time? Don't worry, there is still time for you to assist the chapter and the next individual who will hold your position.

**Update Activity and Project Reports.** Officer Activity and Project Reports, which should be completed on at least a monthly basis, are a great way to document projects you coordinated and the activities with which you were involved. The form, on the following page, is designed to make it easy for you to document activities and progress towards goals without the need for a lengthy report. This form can also be modified or duplicated to suit the needs of the chapter.

Reports and comprehensive records should include information about (a) meetings held or attended (agendas and minutes to meetings, resolutions, referendums), (b) committees and task forces (charge given to committee, progress on all tasks, and membership roster), and (c) personal projects (contacts, progress with task, ideas for advancement).

**Update Officer Manual.** Do you still have your officers' manual? Is it up to date?

**Update Inventory of Records and Supplies.**

**Complete Organizational Assessment.** How do you feel about the organization's performance over the past year? What factors played the greatest role in making it a good or not-so-good year? Do you have any recommendations for the future? Offer answers to these questions and more by completing the Organizational Assessment in this guide.

**Complete Position Assessment.** How do you feel about your performance over the last year? What factors had the greatest impact in making it a good or not-so-good year? Do you have any recommendations for the future? Offer answers to these questions and more by completing the Position Assessment in this guide.

**activity and project report**

**officer report**

**organizational assessment**

**position assessment**