FRATERNITY AND SORORITY LIFE

COLORADO STATE UNIVERSITY

Officer Transition Resource Guide

New chapter officers often cite the transition process as unhelpful or even non-existent. Outgoing officers, at the end of their term and often exhausted and burned out, have little energy in reserve for planning an effective officer transition program and holding others accountable for effective officer transitions. Yet it is effective officer transitions that assist new officers with their roles, ensuring there is continuity and progress is not lost between officer terms. True officer transition begins with identifying potential leaders and creating pathways to leadership by encouraging learning and curiosity among younger/developing members. This resource guide starts with the planning of the logistical transition process, but true officer transition works to create an ongoing leadership pipeline nurtured throughout the year.

Officer Transition Recommendations:

- **Schedule an officer transition program early.** Set a date and time for officer transitions early, so both incoming and outgoing officers are aware of the in-person expectation for transitions. Setting this date early ensures that it is held on outgoing officers' calendars and that new officers have this expectation on their calendar before their election into their role.
- **Spend time developing an officer transition program agenda**. Think about what new officers need to know – both in terms of specific content knowledge, but also skills. Think about the organization and the fraternity/sorority community context that is necessary for officers to glean before they can be successful. Ensure that these items are addressed in a transition program.
- **Ensure that the Elevation Accreditation Program is woven into your transition program.** The Elevation Accreditation program is central to the chapter leadership experience of fraternities and sororities at CSU. The program, when done right, encourages ongoing assessment of strengths and opportunities, assists with goal setting, and creates opportunities for reflection that are helpful in officer transition. The program also ensures that work around goal setting and reflection is captured

and can be easily shared. At a minimum, it is recommended that an officer transition program provide baseline education about the Elevation program. Office of Fraternity & Sorority Life (OFSL) staff can either provide this type of general education or provide resources for chapters to deliver this content themselves. An opportunity exists to share the reflection component of the Elevation program with incoming officers as a part of transition, so they understand the chapter's current progress toward stated goals. Additionally, outgoing and incoming officers should work through the assessment component of the Elevation program *during transitions*. This allows outgoing officers to assess their experience and reflect on successes and areas of growth with the new officer, and ensures the new officer uses this wisdom and reflection to set goals for the future. An entire set of officers can even work through assessments together to utilize everyone's collective wisdom about the state of the chapter.

- **Provide for group and individual transition time.** Effective officer transitions generally provide for large-group time where officers can work together to understand context, review general expectations of all officers, determine what culture they want to set for working together, and more. Additionally, outgoing and incoming officers should have the opportunity to work together to review the intricacies of the particular individual position in depth.
- **Provide closure and celebration of outgoing officers and allow new officers to connect.** An officer transition program provides a wonderful opportunity to thank and celebrate outgoing officers for their hard work. It is an opportunity for closure and meaning making that often doesn't occur in a different setting. Officer transition programs allow a new set of officers to connect with one another and set expectations and norms as a group.
- **Check resources from your (inter)national organization.** Many (inter)national organizations provide resources for chapter officer transition programs. Check in with your organization and see what materials and recommendations your organization provides.
- **Create shadowing opportunities.** While it is recommended that chapters host an actual officer transition program at a set date and time, officer transitions likely occur over time, and knowledge cannot effectively be transferred at just one point in time. Build an election timeline that allows for incoming officers to shadow outgoing officers at meetings and programs to understand what the role looks like in action. Many professions require practical training and shadowing to practice the role before doing it full-time. Our chapter officers could benefit from this same practice!

Officer Transitions – What Not to Do:

- **Simply hand over materials with no context or meaning making.** Outgoing officers, often in a hurry to finish their role at the end of a semester, sometimes simply hand over physical or virtual materials and leave the role. This does not allow for any instruction or meaning making, and while the new officer may logistically have access to needed materials, there is more to learning required than reviewing previous documents (that may or may not be organized or provided with context).
- **Never actually meet or avoid future connection.** While it may be difficult to find the time, it is important for officer transitions to occur with at least one meeting. It's also important for the outgoing officer to be reachable in some way for the incoming officer to ask questions or seek context as needed.
- **Ignore discussing larger responsibilities and context.** While there is likely a job description provided for the position that details responsibilities, those job responsibilities exist within a current context. It is the responsibility of the outgoing officer to provide that context. For example, a financial officer should not just hand over materials without talking about the state of the chapter's financial standing, outstanding invoices and revenue, conversations and/or agreements with members about dues, etc. An outgoing president should explain to an incoming president any existing conduct matters or outstanding sanctions. There exists a current reality that the officer role functions within, and this information is essential for incoming officers.

What Materials Should Be Provided in Transition?

Any officer transition should include the hand-off of materials and information that will provide useful to an incoming officer in an ongoing way. This could be provided in one transition document or a notebook or a drive that is accessible to the new officer.

Recommended materials needed for this transition include:

- **Elevation Materials:** Outgoing officers should provide examples of what has been previously submitted by the chapter as part of the Elevation process (as relevant to the officer role).
- **List of Logins:** A list of login information needed for a particular officer should be included, which might include email information, membership systems, online banking, the online chapter portal, etc.
- **Identification of Stakeholders and Contact Information:** Outgoing officers should identify who their contacts and stakeholders are and provide contact information for those individuals. This might include the name and contact information of a

faculty/staff advisor (often forgotten by chapters in transition), other advisors, the chapter liaison, community partners, (inter)national organization contacts, peers in other chapters, etc.

- **Operational Calendar:** Outgoing officers should provide a month-by-month calendar of tasks or general areas of responsibility to help guide the new officer. This is especially helpful as the new officers begin and are working to identify the tasks to take on first.
    - This operational calendar should include the annual Elevation timeline and due dates that are available online.
- **List of Regular Meetings & Meeting Role Expectations**: All chapter officers will have some meetings to attend. Many of these are internal to the organization (chapter, council/exec, committees, etc.). Some of these might be broader to the community (governing council meetings and roundtables, (inter)national expectations, etc.). Outgoing officers should list what these expectations are and describe what the officer's role in in those meetings is (leading them, convening them, contributing to them, etc.).
    - Be sure to include required OFSL and council programs like Officer Workshop Series events and mandated council programming. All OFSL and council programming are noted on the community calendar available at the bottom of the homepage of the FSL website.
- **Access to a Drive or Transition/Position Materials and Resources:** If there is an additional location where materials and past examples of materials are stored (an online drive, physical materials, etc.), that should be included in transition materials.
- **(Inter)National Organization Resources and Forms:** All chapters will have expectations from their (inter)national organization in terms of forms that are required, materials submissions, approvals, etc. A list of what these are, when and how they are due, and past examples of these materials should be provided in transition.
- **Outgoing Officer Contact Information**: Assuming outgoing officers are willing to be reached with additional questions or concerns, contact information for that officer should be provided.
- **Chapter Constitution and Bylaws:** All chapter officers should have access to the chapter's governing documents. Typically, that includes a constitution and bylaws, but there might be additional materials that should also be provided specific to the chapter. These documents themselves, or a path to find these documents, should be provided in transition as they are fundamental to a chapter's operations.

- **Relevant Community Policies**: Depending on the officer role there are CSU fraternity and sorority policies that may be relevant to the officer that should be included in transition materials. Examples include the Joint Policy on Risk Management and the Joint Policy on Philanthropy and Fundraising. Officers in these areas should *begin* their role with an understanding of these policies based on how they were transitioned. Council-specific policies and expectations are available on the council specific pages on the FSL website.
    - Interfraternity Council Information
    - Multicultural Greek Council Information
    - National Pan-Hellenic Council Information
    - Panhellenic Association Information
    - Professional Fraternity Council Information
- **(Inter)National Organization Handbooks/Policies:** All (inter)national organizations will have their own policies, expectations, and handbooks for officers. Outgoing officers should ensure that new officers have access to these materials and understand their implications.
- **Minutes and Reports:** If there are past reports or meeting minutes that are helpful to access and/or review for the new officer (to get up to speed or that are central to their role), those should be provided and easily accessible.
- **Financial Records:** Depending on the role, an overview of financial records or access to banking or other financial systems may be essential for the officer and should be provided in transition.

Elevation in Transition & SMART Goal Setting

As a compulsory expectation for all fraternity and sorority chapters at CSU, the Elevation Accreditation should be part of a chapter's officer transition program. That could look like the following:

- A general presentation to all new officers about what Elevation is
    - The OFSL provides resources online to assist with education
- An overview of previous years' performance and submitted materials
    - Previous Elevation outcomes and priority area submissions are available in the chapter's online chapter portal accessible via the FSL website.
- The completion of assessments during the transition program
- A review of the Elevation timeline with reminders about upcoming due dates and expectations

Officer reflection is part of Elevation expectations, and whether the officer role participates formally in the Elevation program, the concept of assessing and then setting goals is

effective for anyone. The assessment template is used in Elevation as the first step for officers to assess the chapter's current reality in each of the seven priority areas and then identity goals that result from that assessment. The seven priority areas include academic achievement, harm reduction, community service and philanthropy, membership development, membership intake/recruitment and new member retention, chapter management, and external relations.

In general, reflection questions officers should consider and explicitly discuss during a transition program should include:

- What is our current reality in this particular area? What went well for the previous officer and what needs improvement?
- How did our chapter perform in the previous year in the area for which the officer is responsible?
- Based on our understanding of our current, honest reality, what is a goal for the coming semester/year in this area (list as many as needed)?

The action plan template in the Elevation program includes an expectation that officer goals are set and communicated using SMART goal systems. That includes goal setting that is:

Specific:
Goals must be something that can be described and understood easily by others – finite conditions, not general feelings. How is this goal specific? What will be executed or accomplished because of this goal? Who is responsible for this goal (this might be multiple people)? A specific goal should identify a specific outcome and not be vague or difficult to assess.

Measurable:
Whenever possible, use numbers or percentages to mark achievements of the goal. You can't rely on personal opinion. How is this goal measurable? What is the metric for success? How will you know the goal has been accomplished? This often includes specific numbers, percentages, or projects completed or attained.

Attainable:
Is the goal realistic? Goals should be a stretch to obtain but not impossible. Members will work toward what they believe they can achieve and are not inspired by boring, easy goals. Does the goal need to be adjusted to make it more attainable? Is it likely the chapter will accomplish this goal? What are the barriers to possible success of this goal?

Relevant:
Ensure that your goals serve a relevant purpose. How does this goal help us address the concerns or areas of improvement identified in our assessment? How does this goal help us attain the expectations of our (inter)national organization? How does this goal ensure we are living our organizational values/purpose?

Time-Oriented:
Goals must have an end date. Creating a sense of urgency will push members to work harder and ensure all are on the same timeline. When will this goal be accomplished? This might include a number of smaller dates for help in achieving the overall goal.

When utilizing Elevation to complete assessments and begin goal setting in the transition process, SMART goal setting is recommended and will be helpful in the action plan component of the Elevation program.

Transition Checklist for Chapter Presidents (from OFSL):
Chapter presidents should consider working through the following items in transition with the incoming chapter president to ensure they are familiar with Office of Fraternity & Sorority Life and governing council expectations and needs.

- **Access the chapter portal.** Every chapter has a password-protected chapter portal that includes chapter-specific information including past Elevation materials, the current certificate of insurance, grade reports, conduct records, and more. The outgoing president should share the webpage and password with the new president and review the portal together. OFSL chapter liaisons will provide chapter portal information to new chapter presidents as well, and new presidents are encouraged to update the password used to login on a regular basis.
- **Update the chapter's calendar with community and council events.** New chapter presidents will work with their chapters to build a chapter calendar for the following year or semester. The OFSL chapter liaison will send a message that includes community and council events and programs for the following semester. This is shared so that chapters can integrate these community expectations into their calendar planning. For example, incoming chapter presidents will receive information about the Officer Workshop Series Kickoff at the beginning of each semester, attendance at which is required in Elevation. Specific officers required to attend these workshops will not receive this communication directly because the OFSL does not yet collect the chapter officer contact information beyond the

president. It is imperative that the president add the OWS Kickoff to the chapter calendar and communicate in advance with relevant officers. There are many community programs that should be added to a chapter calendar. These events will be communicated with the president (and the president is responsible for sharing these events more widely) and can also be viewed on the FSL calendar (viewable at https://fsl.colostate.edu).

    - As part of the calendar communication the incoming chapter president will receive, monthly president's forum dates are provided for the following semester. Attendance at presidents forums is required by Elevation, so these dates and times should be added directly to the chapter president's calendar.

- **Overview the weekly president's digest.** The outgoing president should review the president's digests that are sent weekly by the OFSL. The outgoing president can share how they utilized and passed along the information contained in the president's digest to the chapter and individual officers. The incoming president should know about president's digests and how and when they are received.
- **Review the roster update process.** Three times each semester the chapter roster will be updated as outlined in Elevation expectations. The current chapter roster and instructions for updating that roster are sent only to the chapter present for each of those updates. While the president may work with other chapter officers to review and update the roster (like a secretary or administrative officer), the president is responsible for this communication and ensuring this expectation is satisfied. The outgoing president can share how this responsibility was previously managed, so roster updates are not a surprise to the incoming president, and they are able to make a plan for executing the process themselves.
- **Review Registered Student Organization (RSO) processes and make changes in Ramlink.** Every chapter must re-register as a student organization each year. This process is managed by the SLiCE office. More communication will be sent with specific steps for re-registration for fraternities and sororities (which simplifies the process compared to other student organizations). However, at a minimum, the outgoing president should ensure that the new president and financial officer are listed as officers in RamLink (the student organization online system) so that the new officers are able to engage appropriately in the re-registration process. This also enables the new president to add other officers to RamLink, which helps the organization with basic operations like room reservations (which are required to be made by listed officers of registered student organizations).
- **Review the Elevation program and determine who is responsible**. Each chapter has a slightly different model for managing the Elevation Accreditation Program. The

president is the main point of contact for the chapter related to Elevation from the OFSL, and the transition process should include an overview of how Elevation has historically been managed by the chapter and what role the president has (or should/could play) related to the chapter's success in managing the program. Additionally, if the chapter is unaccredited there may be additional responsibilities or action steps to talk through. At the close of each semester there are several reports required by Elevation (roster update, leadership development report, service and philanthropy report). Outgoing officers should ensure these end of semester requirements are completed appropriately and share any outstanding expectations with the incoming president.

- **Make a chapter liaison connection.** Each chapter has an OFSL-assigned chapter liaison that serves as the point of contact for the chapter. The chapter president should know who the OFSL chapter liaison is and the incoming chapter president will hear from the chapter liaison quickly upon beginning their role. Some new presidents appreciate the opportunity to meet or connect with their chapter liaison as their term begins.
- **Detail the governing council connection.** In transition, the chapter president should detail the chapter's current status and relationship with their governing council and detail how the chapter president interacts with the governing council. In some councils the chapter president serves as the chapter's delegate at council meetings. In some councils the president is required to attend certain programs or roundtables hosted by the council. In all instances, the chapter president should be aware of happenings in their governing council and ensure the chapter is educated about governing council expectations and realities.