

FRATERNITY AND SORORITY LIFE COMMUNITY PRESENTS

Leaving a Path in the Bear Cave

TIPS FOR OFFICER TRANSITION

IFC

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Leaving a Path in the Bear Cave

Your year as an officer is coming to an end and new officers are being selected. It is imperative that you are now leaving a path for the next person to follow. Take this time very seriously. Dedicate time to educating and grooming the next officer. Reflect on how you felt being new into your role and being overwhelmed and under prepared. Let us decide that this year we are going to change that cycle.

The Process

A thorough leadership transition plan is:

- The responsibility of both the outgoing and incoming officers
- A way to help the group avoid starting over or starting from scratch every year
- A transfer of significant organizational knowledge
- Minimizes the confusion of leadership changeover
- Gives outgoing leaders a sense of closure
- A great opportunity for outgoing leaders to evaluate the year
- An orientation process for new leaders
- The leadership changeover period
- Utilizes the valuable contributions of experienced leaders, usually the most neglected members in your group.
- Helps incoming leadership absorb the special expertise of the outgoing leadership.
- Increases the knowledge and confidence of the new leadership.

When Do You Start? Early!

- Begin early in the year to identify emerging leaders.
- Encourage these potential leaders through personal contact; help in developing skills, delegating responsibility to them, sharing with them the personal benefits of leadership, clarifying job responsibilities, letting them know that transition will be orderly and thorough, and last, modeling an open, encouraging leadership style.
- When new officers have been elected, orient them together as a group with all of the outgoing officers. This process provides the new leaders with an opportunity to understand each other's roles and to start building their leadership team.
- Be sure to transfer knowledge and information necessary for them to function well. An organization history and flow-chart might be helpful. Take time to organize any files or notebooks so they may quickly access information.

What Do You Need To Transfer?

Think back to your first weeks. What could you have used to do your job better?

Some suggestions are:

- Effective leadership qualities and skills.
- Problems and helpful ideas, procedures and recommendations.
- Written reports:
 - o Containing traditions, ideas or completed projects; continuing projects and concerns; or ideas never carried out.
- Personal and organizational files.
- Acquaintance with physical environment, supplies, equipment and any office procedures.
- Introduction to personnel (advisors, administrators, contacts, etc.).

A complete record of the organization's structure, goals and accomplishments (through complete and organized files):

- Constitution and by-laws
- Organizational goals and objectives for previous year(s)
- Job descriptions/role clarifications
- Status reports on ongoing projects
- Evaluations of previous projects and programs
- Previous minutes and reports
- Resources/contacts lists with addresses and phone numbers
- OSE Officer Transition information
- Financial books and information
- Mailing lists

Fraternity and Sorority Life Quick Reference Sheet

I. Review the Missouri State Mission and Vision and FSL Goals and Vision.- Begin to ask the new officer where their leadership fits into the mission and vision at Missouri State. <https://www.missouristate.edu/studentengagement/FSL/>

II. Fraternity and Sorority Life Policies – Understanding the policies of FSL is imperative in leading a chapter and or council. (All of this information can be found on our FSL Website under forms)

<https://www.missouristate.edu/StudentEngagement/FSL/policies-forms.htm>

- Philanthropy and Community Service Guidelines
- FSL Governance Statement
- Residence Life Housing Policy

III. Fraternity and Sorority Life Forms

- Check out the FSL Quick Reference Sheet

https://www.missouristate.edu/Assets/StudentEngagement/Fraternity_and_Sorority_Life_Forms_Quick_Reference_Sheet.pdf

- Social Event Registration
- Philanthropy and Community Service Guidelines
- Educational Program Report
- Philanthropic Donation Report

IV. Rosters

- Potential New Member Grade Verification
- New Member Roster

<https://www.missouristate.edu/StudentEngagement/FSL/policies-forms.htm>

Fraternity and Sorority Life Quick Reference Sheet Continued

V. Annual Feedback

- Annual Feedback should be completed with the outgoing and new chapter president.
- Set up a meeting with the Fraternity and Sorority Team to review the annual feedback.

<https://www.missouristate.edu/Assets/StudentEngagement/AnnualFeedbackMeetingCriteria.pdf>

VI. Fraternity and Sorority All Presidents Meeting

- All Presidents meeting is once a month for ever FSL President to attend to receive annual updates and changes that may occur within in Fraternity and Sorority Life.
- Attendance is required unless a notification is sent to your Fraternity and Sorority Advisor.

VII. Fraternity and Sorority Life Leadership Retreat

c. January 16th- 17th, 2021- The FSL Retreat is required for all presidents and council officers to attend. There will be a variety of session in person and via zoom.

Officer Resources

If you are outgoing officers don't already have a notebook, provide an inexpensive one with pocket dividers and an outline of what they should include in the notebook they are preparing to pass on, such as the following items. You can add a calendar for the coming semester/year, officer and member roster, budget, and Constitution and by-laws.

1. Job Description

- a. Specific responsibilities of the position
- b. Any changes that are needed in the job description

2. Job Time-Line

- a. Current year calendar that indicates when the outgoing officer did everything
- b. Recommend dates by which job tasks should be completed to fulfill responsibilities in a timely manner

3. Event/Project Documentation

- a. Records of how each project, event or activity was implemented, including files on disk and hard copies. For example:

Scholarship Program Chair: facility, facility cost, when reservation must be made; guest speaker invitation and thank you letters; award categories and criteria; application; application timetable; gifts for award winners, vendor, address, phone, cost, invoice, how far in advance to order; guest list; invitation, printer, number of copies, cost, invoice, alternative sources, production schedule, invitation distribution timetable; etc.

Officer Resources Continued

4. Evaluation of Event/Project

- a. Written evaluation from participants if collected
- b. Outgoing officer's feedback and recommendations

5. Budget

- a. Accounting of how allocated funds were spent

6. Resources

- a. Key resources people helpful in fulfilling responsibilities and how to contact them

7. Other Essentials

- a. Keys, account transfers, P.O. Box number, etc.

The officer notebook can be shared during the meetings with your replacement. It should cover all aspects of your responsibilities and how those tasks fit into the organization's big picture. Recommend that your replacement file "historical" documents in the notebook such as meetings minutes when he/she has become comfortable with the information. This way, the notebook can be used as a working tool rather than something to be completed at the end of the year (usually during finals!). Each organization is different so feel free to add and delete topics. Your replacement will thank you throughout the year!

Outgoing/Incoming Officer Evaluations

The following evaluations may be completed by the outgoing and incoming officers, and included in the officer notebook.

OUTGOING OFFICER EVALUATION

Name of Outgoing Officer:

Office:

Date:

List three things during your term in office that were considered most important:

1.

2.

3.

List three things you wish you had done during your term in office:

1.

2.

3.

Outgoing/Incoming Officer Evaluations Continued

List three important “pieces of advice” for the incoming officer:

1.

2.

3.

List any outstanding items that still need completion prior to your leaving office:

As outgoing _____ (officer title), I promise to assist the newly elected officer in any way I can.

Outgoing Officer Signature

Date

Return this form to your organization’s president for filing.

Outgoing/Incoming Officer Evaluations Continued

INCOMING OFFICER EVALUATION

Name of Incoming Officer:

Office:

Date:

List three things that made you want to run for this office and why:

1.

2.

3.

List three new ideas that you would like to implement for your office this year:

1.

2.

3.

Outgoing/Incoming Officer Evaluations Continued

List three important foreseeable problems in your office:

1.

2.

3.

List possible solutions to the above three problems:

As incoming _____ (officer title), I promise to ask the assistance of the outgoing officer or president when I need help.

Incoming Officer Signature

Date

Return this form to your organization's president for filing.