

## Alpha Gamma Rho Fraternity Officer Transition Guide

Does it seem like each officer is recreating the wheel each year? Does your officer transition include passing someone a box of materials and a hardy wish of “good luck”? Even if you do currently have an officer transition, you probably can achieve better results with a better transition.

An effective officer transition is best facilitated through an officer transition retreat. Holding a one day retreat can make all the difference in the coming year for the new officer team. It is the responsibility of the outgoing VNR Planning and Noble Ruler to plan an effective retreat. The newly elected NR may want to follow up to assure an effective retreat is being planned. The most effective retreats are away from the chapter house and even campus. Find a place where you wont be filled with the distractions of phone calls, girlfriends and time commitments. All new and old officers should be present, along with the Alumni President and Adviser. You may want to ask the Adviser or Alumni President to lead the meeting.

An effective retreat includes a good agenda planned well in advance. Some items to consider including on the agenda are:

1. **One-on-one officer meetings-** the old and new officers meet to talk about the position. This discussion should include a review of job responsibilities, a review of current projects, explanation of budgetary considerations and identification of resources. The transition files/notebook should be reviewed thoroughly.
2. **A group meeting-** share general advice for the new executive committee and give them a heads up about challenges they may face. This is also a good time to clarify roles and responsibilities, as well is review the committee system in place.
3. **Group goal setting-** old and new officers should work together to identify goals for the upcoming year. This will help long-term goals and vision be passed on from year to year.

Other agenda items might include a guest speaker about leadership, parliamentary procedure training, team building or leadership style assessments. Your Greek Adviser may be able to help you identify resources in any of these areas.

Other officer training suggestions include electing officers far enough in advance for the new officer to shadow the old one for at least a few weeks.

An important component of any officer transition includes reviewing the officer notebook. Some of the components every officer notebook should include are:

### Tab 1: Governance

- \_\_\_ Constitution
- \_\_\_ By-laws
- \_\_\_ Policies
- \_\_\_ Standing rules
- \_\_\_ University rules pertaining to the office
- \_\_\_ Officer Job description

Tab 2: Key Contacts:

\_\_\_ A list of important people, including fellow officers

Tab 3: Resources:

\_\_\_ University resources

\_\_\_ Alpha Gamma Rho resources

\_\_\_ Other resources

Tab 4: Calendar:

\_\_\_ Calendar of events and activities for past year

\_\_\_ Records of past years activities

\_\_\_ Current calendar of major college/university events

Tab 5: Projects:

\_\_\_ Information about finished and unfinished projects

Consider adding additional items as needed. A box or folder full of information in no particular order is NOT an acceptable transition folder!

A well-performed officer transition can make the difference in how well a chapter does in the upcoming year. Old officers have a responsibility to make sure the new officers get a proper transition. New officers must hold the old officers accountable to assure a proper transition is planned.

**How a NEW officer can facilitate the transition**

1. Determine what you need to learn-both the big picture and the little details.
2. Determine which old officers you need guidance from (look for the not-so obvious).
3. Make a list of the above information, including specifics.
4. Set up appointments with the appropriate individuals, and ask for enough time to be thorough. Prepare lists of questions, request for information, etc.

**How an OLD officer can facilitate the transition**

1. Organize your office, materials, thoughts, etc. Finish all projects and correspondence.
2. Identify the areas of responsibility, people, details, phone numbers, etc. that you wish someone had told you when you took office. Introduce your successor to key people.
3. Even though you may be burned out, set aside a structured time period to handle the exchange of information.
4. Be available to the new officer (at his request) to provide follow-up information.

This document is an adaptation of the *February 1999 MGCA Connections* and *The NIC Officer Training & Transition Guide*.