



OUTGOING OFFICER GUIDE

BETA OFFICER TRANSITION OUTLINE

Before the newly-elected officers of your chapter officially assume their responsibilities, it is wise for the outgoing and incoming officers, as well as advisors, to get together for a transition meeting. Through a transition meeting, the new officers will be able to learn from the experience of the outgoing officers and offer continuity and continued growth for the organization. A casual, open atmosphere should be encouraged so that the chapter can benefit from an honest evaluation of the accomplishments and problems of the previous year. The following outline can help you make your transition meeting flow as smoothly as possible.

Help members get acquainted, introduce advisors and explain the purpose of the meeting.

I. The Year in Review

- A. **Goals:** Review the executive team's goals for the previous year.
Review the CPLA Report and Keystone Priority Plans
What did we hope to accomplish?
How well did we do on each goal?
Which goals should be carried on this year?
Which goals need to be changed?
Which goals are no longer feasible?
- B. **Programs and Activities:** Evaluate what your group did.
How effective were the programs / activities we sponsored?
Did we have a good balance in our schedule of programs and activities?
Were our programs and activities consistent with our goals?
Which activities and programs do we want to repeat?
- C. **Membership:** Evaluate number of members and their commitment
Do we have too many, too few, or just the right amount of members?
Were our recruitment efforts successful?
Are our members as actively involved as we want them to be?
Were there opportunities for members to get involved in a meaningful way?
- D. **Officers and Organizational Structure:** Evaluate officers and structure.
Are officer roles and responsibilities clearly described?
Did officers work as a team, or is there more teamwork needed?
Is there two-way communication between officers and members?
Is there consistent and quality communication between officers and advisors?
- E. **Chapter Operations:** Evaluate finances, communication, etc.
Were the finances adequate for our group, and managed properly?
Were meetings run effectively? Was their frequency adequate?
Did the committee structure work?
Did we have scheduling conflicts with other groups or activities?
Did our elections run smoothly and clearly?

- F. **Advisor Involvement:** Evaluate both quality and quantity.
Do we have the advisors we need?
Did our advisors provide the support we needed?
Did we utilize our GFO properly this year and communicate effectively to them?
Did we give our advisors and the campus Fraternity & Sorority Advisor a chance to get involved?
How could we improve involvement?
- G. **Campus Brand and Public Image:** Evaluate how other groups perceive you.
How do we see ourselves? Is this how “outsiders” see us?
How can we enhance our image?
Is our image consistent with the mission and values of Beta Theta Pi?

II. **Your Legacy to the New Officer Team**

- A. What are the current strengths and weaknesses of the group?
B. What is the best advice you can give your successor?
C. What were there major challenges and accomplishments in your term?

III. **Officer Transition**

Have the new and outgoing officers meet individually to discuss:

- A. Responsibilities of the position, with a job description if possible.
B. Go over important documents, processes and online resources for the role.
C. A timetable for completion of annual duties.
D. Unfinished projects.
E. Important contacts and resource persons.
F. Mistakes that could have been avoided.
G. Advice for the new officer.
H. Any questions the new officer may have.
I. Where the outgoing officer can be reached with future questions.

IV. **Wrap-Up**

Outgoing officers should wish the incoming team luck and offer last minute advice.
Provide an opportunity for informal socializing.

Adapted from: The Wichita State University Student Organizations' Handbook (1992-1993)



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OFFICER DOCUMENT & FILES

Should Include:

1. Beta's mission and vision statements
 - a. Mission: To develop men of principle for a principled life.
 - b. Vision: Every member will live Beta Theta Pi's values.
2. Beta Theta Pi Code
3. Chapter Constitution and By-Laws
4. Any chapter policies and procedures you may have
5. Contact information for all officers (new and outgoing)
6. Important names and numbers of campus and community resources
7. Summary of all programs and events
9. Executive Officer Goals- both met and unmet
 - a. CPLA Report
 - b. Keystone Priority Plan
12. Chapter Calendar
13. Where to access:
 - a. Important campus forms (i.e. Annual Registration forms from your Student Activities Office, Greek Affairs forms/IFC forms, Student Government Fund Request forms, etc.)
 - b. Beta reports
 - c. Beta resources (i.e. MyBeta, Billhighway, Chapter Spot, How to Beta, etc.)

Outgoing Officer To-Do List

Organize all files

Finish all necessary correspondence (letters, e-mail, phone calls)

Develop action plan and time-line for new officer transition. Including but not limited to:

1. Necessary meetings attended and conducted by officer
2. Important tasks
3. Sharing tasks and duties with other group members
4. Introductions to key people
5. One on one meetings and training
6. Financial Information



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OUTGOING OFFICER WORKSHEETS

Please think through and respond to the following questions regarding your responsibilities. This information will be helpful to your successor.

1. What I liked best about my job...
2. What I liked least about my job...
3. The most difficult decision I made was...
4. What I could have done to make the experience better was...
5. Obstacles to performing my job effectively were...
6. Aids which assisted me in handling my job were...
7. Things I wish I'd known before I took the job were...



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ONE-ON-ONE MEETING HANDOUT

This handout will assist in officer transition by focusing upon past accomplishments and providing a critique of the year in office. This report should serve as a supplementary resource in planning for the new officer's term.

Office: _____ Name: _____

1. List other officers / chairmen with whom you worked and the projects involved.
2. List specific accomplishments realized during your term in office and the reasons for their success.
3. List any problems or disappointments you encountered as a part of your office and suggest ways of avoiding or correcting them.
4. List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, university / college officers, community resources, etc.
5. Comment on the timetable applicable to your office. Give suggestions for increasing efficiency and effectiveness.
6. List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

Source: NIC Retreat Workbook (verbatim, pg. 47)

Outgoing Officers Major Accomplishments

Accomplishments	Barriers / Limitations	Resources	Solutions	Still to Be Done



OUTGOING OFFICER GUIDE

INCOMING OFFICER WORKSHEET

Please think through and respond to the following questions before meeting with your predecessor regarding your responsibilities.

1. Things specific to the position I want to know about (forms, duties, etc...)
2. Things I should do over the break (before the beginning of the next term).
3. People (positions) that I should get to know...
4. Services that I need to know about...
5. Things I need to know about working with my advisor...
6. Other questions I want answered...



OUTGOING OFFICER GUIDE

INDIVIDUAL GOALS

Before you begin goal setting with the other executive officers, you may benefit personally by developing your own goals. The goals may vary in terms of being long or short in range. Some things you may want to think about for yourself might be: programming ideas, personal growth, the people you will be working with, budgeting, leadership training, etc.

Begin your own goal setting now by brainstorming for possibilities of what you would like to be about during the upcoming year.

Now list things you can do right away:

Things I want to do starting right now!!! (Be specific - how, when, where...)

- 1.
- 2.
- 3.

Things I want to get started on soon: (when?)

- 1.
- 2.
- 3.

How do I get started? Is there anything I can do before tomorrow? What specifically?

What can I realistically have accomplished one-week from today? One-month?