



# Changing of the Tides

**Slating, Elections & Transitions**



**Revised September 2021**



**A successful chapter views a change of officers as an ongoing process, not just a single event. With knowledge, planning and organization, each chapter can continue sailing a smooth and steady course, even when the tides are changing!**



Updated: September 2021  
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## Updated September 2021

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## *Are you . . .*

### *a good communicator?*

president  
vp: member education  
vp: membership  
vp: Panhellenic  
vp: social standards  
director of alumnae relations  
director of rituals  
director of social events

### *project-oriented?*

vp: communications  
vp: Foundation  
vp: member education  
vp: programming  
director of Anchor Splash®  
director of chapter archives  
director of committees  
director of DG Dialogues  
director of interfraternal activities  
director of Lectureship  
director of rituals  
director of senior programming  
director of special events

### *A motivator?*

vp: Foundation  
vp: member education  
vp: membership  
vp: programming  
vp: social standards  
director of continuous recruitment and retention  
director of e-communications  
director of new members  
director of primary recruitment  
director of rituals  
director of scholarship  
director of senior programming

### *efficiency-oriented?*

president  
vp: communications  
vp: finance  
director of committees  
director of e-communications  
director of new members  
director of rituals  
director of service hours

### *an individual worker?*

vp: communications  
vp: finance  
vp: Panhellenic  
director: activities  
director of chapter archives  
director of e-communications  
director of house management/chapter property  
director of public relations  
director of recruitment records  
director of rituals

**Be a part of the officer team and  
make a difference in the future of  
your chapter!**

# Preparing for Elections

## Change

Life is constantly full of change, yet change can often be overwhelming and confusing. One of the greatest changes a collegiate chapter faces is the election of chapter officers.

The material included in this handbook is designed to assist chapters in planning and implementing the slating/election/transition (SET) process. A successful chapter views a change of officers as an ongoing process, not just a single event. With knowledge, planning and organization, each chapter can continue sailing a smooth and steady course, even when the tides are changing!

## How to Prepare for Elections

One thing a chapter can do to continually prepare members to be leaders in their chapter is to develop and implement a strong committee system. This way, members and new members have many opportunities to broaden their leadership, communication and organizational skills before serving as a chapter officer.

To prepare for elections, the chapter president should do the following:

- During the spring, place dates/times for slating, election and transition events on the fall master calendar via Anchorbase which is approved by officers, advisers, the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator (RCS/CAC/NCC) and by chapter vote.
- Distribute information electronically on slating/election/transition procedures four weeks prior to elections.
  - Be sure to include the dates for transition meetings and any regional trainings planned by the Regional Team and/or Executive Offices so that members interested in serving in an officer position can plan to be in attendance. Examples of regional trainings or Executive Offices trainings include regional training days and February Institute. These events are mandatory for certain officers to attend, so it is vital that incoming officers know their attendance is mandatory at such events and when the events are occurring.
- Remind the chapter that the slating and elections process is confidential.
- Update chapter members preferred email address on the Delta Gamma website. All emails regarding the election process will be sent to the email addresses registered here.
- Complete the Identify Officer Position task in Anchorbase to identify which officer positions are to be slated and elected according to your chapter's Bylaws and Standing Rules.
- Complete the Officer Certification task in Anchorbase to determine the members in good standing who are eligible for consideration for office, six weeks prior to elections (elections step 02).
- Six weeks prior to elections, Anchorbase will automatically distribute to all members, new

members, and advisers the Election Step 3 video that describes the election process along with the PowerPoint slide deck that contains a position description for each CMT and JCMT position listed in your chapter bylaws and standing rules, except those that are custom/unique to your chapter. The slide deck also contains information about officer eligibility and member good standing requirements for election voting (elections step 03).

- Elect sophomore and junior members-at-large for Nominating Committee (elections step 04). These members may be elected at the beginning of the fall term.
  - Note: No other officers or members may be added to Nominating Committee.
- If you choose, you may schedule a 30-minute presentation for women interested in assuming a leadership position on leadership skills, motivation and/or communication. This should take place four weeks prior to elections (elections step 05).
- Begin updating officer notebooks in preparation for transitions.

“Leaders are ordinary people with extraordinary talents.”

## Slating, Election and Transition Timeline

### During calendar planning in the spring term

- Put all SET dates and tasks on the calendar.

### 7 weeks prior to elections

- Ask ATC to attend Nominating Committee meetings.
- Ask advisers to attend individual transition meetings and formal transition workshop.
- Elections Step 1:** Complete Identify Officer Positions task in Anchorbase where to identify officer positions to be slated and elected according to chapter bylaws and standing rules.

### 6 weeks prior to elections

- Elections Step 2:** President completes Officer Certification Task which will distribute the Officer Interest form to eligible members along with the election procedure video and position PowerPoint. Officer Interest form due 3 weeks before elections. Members will get access to the Officer Interest Form one day after the president completes Elections step 2.
- Elections Step 3:** Anchorbase automatically sends chapter members the Officer Position PowerPoint and election video to all members and new members that also contains information about officer eligibility and member good standing, which is required to vote in elections.

### 4 weeks prior to elections

- Elections Step 4:** Elect sophomore and junior members at large for Nominating Committee.
- Elections Step 5:** If you choose, present optional program on leadership skills and specific officer responsibilities to the chapter. Organize officer materials in preparation for transition.

### 3 weeks prior to elections

- Officer Interest forms are due 21 days prior to elections.
- Elections Step 6:** 20 days prior to elections, chapter members will be emailed the recommended slate to complete with Officer Interest Report. The recommended slate is due 10 days prior to elections. All women who are eligible will appear in the dropdown for each position. For those who ranked a position, their rank will appear before their first name.

### 2 weeks prior to elections

- Elections Step 7:** BEFORE slating by Nominating Committee, verify that all candidates for president are juniors. If there are any underclassmen, contact RCS/CAC/NCC for approval. Verify that officers required to live in will do so. RCS/CAC/NCC must approve any candidate who cannot live in BEFORE slating. Make all officer candidates aware of attendance requirements at leadership/training seminars such as Convention, Institute, Regional Training Day (RTD), etc. RCS/CAC/NCC must approve exceptions BEFORE slating.



### Slating - 1 week prior to elections

- President downloads the Recommended Slate Results Report from Anchorbase and distributes it to Nominating Committee.
- **Elections Step 8:** Slating. Nominating Committee (with ATC) meets to create the slate. Verify with each member that she will accept the slated position
- **Elections Step 9:** President distributes and posts Slate and information regarding the process to challenge. This will not occur automatically in Anchorbase.

### Final day to challenge the slate.

- **Elections Step 10:** Final day to challenge the slate. This date must be either four (4) days after the slate was posted OR the date listed in your chapter bylaws and standing rules.
- Any slated officer has 24 hours from this date to challenge another position.
- Communicate any challenges to your ATC for their approval.

### Elections

- **Elections Step 11:** Chapter votes. The president inputs new officers in Anchorbase using the Update Officer task. The president will note the start date as the date of officer installation.

### Immediately following elections

- **Elections Step 12:** Nominating Committee (with ATC) meets to appoint directors.
- **Elections Step 13:** Announce directors at next chapter meeting but before the end of the term. Outgoing president puts new directors in Anchorbase using the Update Officer task.
- **Elections Step 14:** Outgoing president should distribute committee applications to all members and new members.
- **Elections Step 15:** Committees announced.

### Officer Transition - before end of fall term

- **Elections Step 16:** Individual Officer Transition.

### 2 - 3 weeks after elections

- **Elections Step 17:** Formal Transition Workshop
- **Elections Step 18:** Officer Installation

## The Nominating Committee

The Nominating Committee is a standing committee of every chapter. The chapter president serves as chairman of the Nominating Committee. She is responsible for ensuring that all materials, necessary election forms and ballots are prepared and distributed, and that the chapter understands the election process. The chapter president must inform the advisory team chairman of the dates of the Nominating Committee slating meeting and the formal transition workshop.

The Nominating Committee is composed of the advisory team chairman and the following seven chapter members:

- president (chairman)
- vice president: social standards
- vice president: finance
- vice president: programming
- director of scholarship
- sophomore member
- junior member

All members must be in good standing to serve. No other officers or members may be added to this committee. The responsibility of the Nominating Committee is to form the chapter slate based on input from the chapter members' officer interest forms and Recommended Slate forms.

The Nominating Committee must consider whether an individual can fulfill the responsibilities of an office. It is equally important to evaluate the personalities and skills of each individual. They should complement one another and allow the CMT to function cohesively. The Nominating Committee, with the assistance of their advisory team chairman, must carefully consider the suggestions of members as expressed on their Officer Interest Form and Recommended Slate form, and not act impulsively on its own.

Another important duty of the Nominating Committee takes place immediately after elections. At this time, the Nominating Committee reconvenes to appoint directors based on election results, chapter members' Officer Interest Forms, Recommended Slates and choices submitted by newly elected officers.

All discussions by the Nominating Committee are to be kept confidential and are not to be discussed outside of the Nominating Committee meetings.

## Nominating and Election Forms

These forms are:

1. Officer Interest Form
2. Recommended Slate

Officer interest form:

- The president must complete the Officer Certification Task on Anchorbase (step 2), six (6) weeks prior to elections, so that an email is sent to eligible chapter members regarding their ability to hold an office.
  - If a member is eligible to hold an officer position, the email will contain a link to a personalized Officer Interest Form, along with the election procedures video and position descriptions PowerPoint.
- Members interested in being considered for an office must complete and submit the officer interest form, indicating on that form the offices for which they would like to be considered.
- Members complete and submit this form electronically by following the link on the website.
- The officer interest forms should be due no less than three weeks prior to elections.

Once members complete the Officer Interest Form, the complete forms are made available for the chapter members' review (step 6).

Recommended Slate:

- Members nominate their choices for new officers and evaluate the leadership capabilities of those running for office by completing the Recommended Slate.
- Every member will receive an email with a link to the Recommended Slate and Officer Interest Report.
- They should be completed and submitted electronically either during personal time or during a specified time in chapter meeting, 10 days prior to elections (step 11).

# Slating

## The Nominating Committee Member Responsibilities

The Nominating Committee and advisory team chairman meet to consider all member-submitted officer interest forms, Recommended Slates in order to formulate a final slate. The slate is developed after the advisory team chairman verifies the good standing of each candidate.

Suggested Nominating Committee member responsibilities:

president

- Chairs the meeting
- Reminds the committee that all discussions must be kept confidential
- Provides each committee member with a list of each office and every member who has indicated an interest in that office
- Keeps order
- Counts votes

vp: social standards

- Reads the Officer Interest Report

vp: finance

- Reads the results of the Recommended Slate forms

vp: programming

- Counts votes if president is a candidate for office

ATC

- Serves as an observer
- Clarifies questions/procedures
- Counts and records votes
- Destroys all record of discussion, voting, slates and evaluation
- Approves the final slate created by the Nominating Committee

## Meeting Procedure for Slating by the Nominating Committee

- What is slating? Slating is the process by which Nominating Committee selects who they feel are the best members for each CMT position. It involves thoughtful discussion and a review of what each member can contribute to a position and to CMT as a whole.
- One office at a time is discussed, following the order of elections as found in the chapter bylaws and standing rules, starting with president, then moving to vp: social standards, and so on. A member must accept the position Nominating Committee would like to slate her for before they can move on to discuss the next position (see below).
  - Members of the Nominating Committee interested in an office must leave the room prior to the start of the discussion related to that office. A member of Nominating Committee may not be considered for an office if she has been present for the discussion related to it.
- Discussion of candidates to be considered for each officer should include:
  - The vp: social standards should read the officer interest form responses of each member interested in the office.
  - The vp: finance should indicate the results of the Recommended Slate Form.
  - Each candidate's strengths and qualifications for the position should be discussed briefly.
  - Only positive comments are permitted.
    - Nominating Committee will consider any candidate who expressed an interest in a position but may also consider other members who did not expressly indicate interest in a specific position on the officer interest form but who are eligible to hold a position and have the qualities needed to fulfill the responsibilities of the office.
    - For chapters over 75 members, members should not hold dual roles. That is, a member slated for a vice president position should not be slated for an Honor Board role and vice versa. For chapters with 75 or fewer members, vice presidents may be slated for Honor Board positions.
    - All candidates must be approved by the advisory team chairman.
- After discussion of every candidate, Nominating Committee members vote heads down, eyes closed, hands up. Open hand = yes; closed fist = no.
- The president and ATC count the votes and announce the name of the top vote candidate, never the actual vote count. The number of votes cast for each candidate remains confidential.
- Each candidate must express willingness to permit her name to appear on the slate.
  - Nominating Committee should contact the member slated for a position immediately after the vote takes place to ensure her acceptance of the slated position. She should be reminded to keep her nomination confidential until the slate is posted.
- Once the slate is verified, the chapter president posts the slate (elections step 09.) The slate can be posted in a common area within Delta Gamma housing and via email to the chapter.
  - The slate should not be posted anywhere in which comments can be added or discussion can occur. For example, the slate can be posted on a Google Drive document, but comments or edits should be disabled. The slate should not be posted on Facebook, or any other social media outlet.

## Posting of the Slate and Challenges to the Slate

When Nominating Committee confirms acceptance of each of the slated positions, follow the procedures outlined in your Bylaws and Standing Rules for posting the slate and procedures for challenging.

Deadline for challenges to be made:

- Members may challenge the slate within the period of time specified in the Elections Procedures in the chapter standing rules.

How to post the challenge:

- Members who post a challenge to the slate need to indicate in writing (on the slate posted in the house or via email sent to the president, ATC and nominated member):
  - the name of the nominee.
  - the position she is being nominated for.
  - initials of the member making the nomination (so that the Nominating Committee knows who made the challenge).

The member being nominated must accept the nomination BEFORE it is posted.

A woman who has been slated may be nominated for another officer position, and accept the nomination, during this challenge period as long as the above procedure is followed.

The advisory team chairman must approve all challenges to the slate before they are presented for vote at chapter meeting.

Once the original challenge period is over, a member who is slated may challenge for another office if all three of the below statements are met:

- the position to which she is slated is challenged,
- she challenges within 24 hours after all challenges to the slate are due, and
- she challenges a position for which she had expressed interest on the original Officer interest form.

As a slated member has 24 hours to complete any challenges of her own, be sure the challenge deadline is 48 hours BEFORE elections are scheduled to occur.

- *In order to best facilitate this, the advisory team chairman should consider posting a Google Doc of the slate, along with challenges to the slate. Anyone on the slate has 24 hours to challenge another position she expressed an interest in on the officer interest form before the challenges close.*

# Elections

## Election Procedure

Officers are elected as described in the chapter bylaws and standing rules, Collegiate Chapter Officers Manual and according to Fraternity policy.

- All voting must be completed on paper ballots or via electronic system, and counted by the president and ATC, with the number of votes being kept confidential.
  - A quorum, as set by the chapter Bylaws, must be present at this meeting.
1. Chapter members are seated alphabetically. Only members in good standing may vote. Uninitiated new members may not be present. Members must be present at the meeting to vote.
    - The advisory team chairman must be present. Challenges to the slate must be approved previously by the ATC. Once approved, ballots and pencils are distributed.
  2. Chapter president reads the slate along with any approved challenges.
  3. If there are approved challenges, then the president should announce the procedure as stated in Fraternity policy and chapter bylaws and standing rules, (i.e. the number of comments (pro only) allowed per candidate, how long a speech may be, etc.). The candidates may then address the chapter.
    - All candidates for a given position should leave the room, except for the one speaking.
  4. If there are no challenges to the original posted slate, the slate may be elected all at once by a single vote by secret written ballot or electronic voting.
  5. If there are challenges to the slate, each office is voted upon separately in the order as listed on the Slate for Election of Chapter Officers by secret written ballot or electronic vote (step 11) If there is only one challenge, it may be more efficient to block vote the first portion of the slate up to the position being challenged, proceed with the election for the challenged position, and then block vote the remaining positions.

## Special Election Procedure

- If a vacancy occurs in a chapter elected office when there are more than three months, from the date of officer installation, including any break periods, remaining in the term:
  1. The vacancy shall be announced at the first chapter meeting and/or activity meeting.
  2. Interested candidates must contact the advisory team chairman for approval within five days following the announcement.
  3. If the candidate is approved by the advisory team chairman, she may speak on why she wishes to serve in this office at the next meeting prior to the election.
- If a vacancy occurs in a director position when there are more than three months from the date of officer installation, the same procedure will be followed, but the chapter management team will meet to appoint a replacement.
- If three or fewer months remain in the elected officer or director's (any officer's) term, when the vacancy occurs,
  1. The vacancy shall be announced at the first chapter meeting and/or activity meeting.
  2. Interested candidates must contact the advisory team chairman for approval within five days following the announcement.
  3. Chapter management team will appoint a member to fill the vacant position, with ATC

approval.

## Electronic Voting

For Elections-related votes

If a vacancy occurs during break and there are more than three months (including the period of the break) remaining in the term, the chapter, in special circumstance, may use the Electronic Voting Guidelines to announce, vote and elect the new officer. This is granted only under special circumstances and must be approved by the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator prior to the election.

- The chapter president communicates the vacant position, the electronic voting process and distributes names of eligible candidates to the chapter.
- Interested candidates must contact the advisory team chairman for approval within five days following the announcement.
- The chapter president communicates the names of the approved candidates.
- Members submit vote electronically within five days of the distribution of approved candidates.

## Appointment of Directors (step 12)

Immediately following elections, the outgoing chapter president will ask all new officers to submit names of members they feel would best fulfill the obligations of the director positions with which they will personally work. Members interested in being considered for appointment to a director position should have completed and submitted an officer interest form, indicating those officers for which they would like to be considered.

Once this information is received, the Nominating Committee will reconvene immediately following elections to appoint director positions. This meeting should follow the same procedures as those previously discussed, with discussion, vote and confirmation of the member's acceptance of the director position. These director names shall be announced at the next chapter meeting or electronically via email after the appointments are made. Note that the directors must be announced before the end of the term.

The choice of directors and their duties for each chapter are listed in the chapter's Bylaws and Standing rules and can be updated during the spring. Any updates are determined by the outgoing chapter president and advisory team chairman, subject to approval of the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator. The following directors are required regardless of chapter size: rituals, scholarship, social events, recruitment records and house management/chapter property.

After the directors have been appointed, the president should send an email to the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator and collegiate development specialist (CDS) who works with her chapter that lists the new officers and directors and their email addresses. The president should also enter all new officers using the Update Officers task in Anchorbase. The start date should be the date of officer installation.



## **Transition**

### **Committee Applications and Assignment (steps 14 and 15)**

At the chapter meeting following elections, the outgoing chapter president will distribute committee application forms to each new member and member for committee placement for the upcoming calendar year. The committee application forms should be completed and returned at the conclusion of the chapter meeting that same evening, if possible. The incoming chapter president and the director of committees, if applicable, will appoint all chapter members and new members to committees based on committee application forms and member/new member preference. These assignments will be announced at the first chapter meeting of the next term.

Committee assignments shall be for 12 months, corresponding to the officers' term. At the end of the academic term, requests may be made by individual members to switch with another member on a different committee. The chapter president will have the final authority to approve committee requests.

Each member/new member is expected to serve the chapter as an officer, director or committee member. Officers and directors shall be assigned to specific committees most nearly related to their area of officer responsibility. Officers whose areas of responsibility involve two or more committees may rotate their attendance at committee meetings depending on the needs of the situation.

### **Officer Transitions (steps 16 and 17)**

Incoming and outgoing officers shall meet to complete their individual transition meetings. This time shall be used to review the responsibilities of the office per the Collegiate Chapter Officers Manual (CCOM) and other chapter specific details related to the position. In addition to the individual transition meetings, a formal transition workshop is planned by the incoming president and attended by incoming officers. It should last from 6-8 hours and will complete the transition process by building relationships amongst the new leadership team and establishing team goals.

More details regarding these transition meetings can be found later in this handbook.

### **Installation of New Officers (step 18)**

Following election of new officers and completion of three transition workshops, each chapter should conduct the Officer Installation Ceremony at a formal chapter meeting. Upon installation, each officer and director shall take the following oath, to be administered by the chapter president: "I do solemnly promise to discharge to the best of my ability, with fidelity and promptness, and in conformity with the Constitution, policies and procedures of Delta Gamma Fraternity, and the bylaws and standing rules of this chapter, the duties of the office to which I have been elected or appointed." A copy of the ceremony is included on page 38 of the Rituals Handbook.

## Updating the Anchorbase Roster

After elections and after Nominating Committee meets to appoint directors, the outgoing chapter president needs to update the officer roster in Anchorbase. This populates the roster with the contact information for the new officers. The start date is the date of officer installation.

- This should happen on the same day as Officer Installation Ceremony.

## Preparation for Officer Transition

Chapter success and continuity is achieved through a detailed, thorough officer transition. Announce transition plans when election procedures are reviewed with the chapter.

Requirements for officer transition are one individual officer conference and a Formal Transition Workshop. Officer transition meetings are required for all outgoing and incoming vice presidents and directors. It is the responsibility of the outgoing chapter president to see that all officers and directors are present during the transition process.

If, for any reason, an incoming officer or director cannot be properly transitioned by her outgoing counterpart, it is the responsibility of the incoming chapter president to transition this officer.

Officer transition consists of two components: one individual officer conference, followed by the Formal Transition Workshop.

# Committees

## Committee FAQs

### *What is a committee?*

The committee is a group of members (committee size determined by chapter size and need) who function as a unit for the betterment of the chapter. Membership is determined through a Committee Application which helps pinpoint individual member interests. Chapter vice-presidents and directors are the committee chairs.

The committee system provides opportunity for chapter involvement, decision-making, leadership development, team building, and sharing the responsibilities of membership. Committee assignments are made so that cliques are disbursed, and members/new members' requested choices are honored when possible.

### *What is the purpose of a committee?*

A committee's purpose is to determine, through its collective wisdom, the best possible solution to a problem, which is then recommended to the CMT through the committee chair. Collective is the key word! Solutions generated by discussion are usually superior to those of any one member.

Committees also support the chapter by helping vice presidents and directors execute their offices. That may mean or include: planning an event; paperwork or computer record entry; PR to the Panhellenic community; or, outreach to local alumnae.

Officers/directors must understand that every member has a unique level of commitment to Delta Gamma. Not all members will give the same amount of time and energy, and flexibility is key. Ultimately, committees enable individual members to develop as leaders and team members, enthusiastically engage in accomplishing a defined goal, hone skills they will utilize throughout their lives, and envision the opportunities for future events—whether large, special, weekly, or annual—which are the hallmarks of each chapter's sisterhood.

## Delegating Authority

DELEGATION is important because it:

- allows more members to be actively involved.
- distributes workload.
- motivates members by giving them value and importance.
- helps organizations run more smoothly.

WHAT and WHEN to delegate:

- matters that keep repeating themselves.
- minor decisions made most frequently.
- details that take up large chunks of time.
- when you feel someone else has specific qualifications that suit the task.
- when someone expresses interest in the task.

WHAT and WHEN NOT to delegate:

- situations where you must change someone's behavior.
- a decision that involves someone else's morale.

- the “hot potato,” that is, the hot issue you would rather avoid.
- something that involves trust or confidence.
- something you yourself would not be willing to do (like menial work).

#### METHODS for delegating:

- Ask for volunteers. Interest and belief in something is one of the greatest motivators for success.
- Suggest someone you feel would be good for the task. Silence in response to a request for volunteers does NOT necessarily mean lack of interest. Often a member won’t volunteer because she lacks the self-confidence to do so.
- Assign the task to someone. The person can always decline.
- Spread the good tasks around. “Good” jobs give people status and value. Make sure the same people don’t always get the “good” tasks.

#### Tips for Committees

1. Transparency: Keep members informed of the committee’s responsibilities on an ongoing basis.
2. Communication
  - Encourage everyone to contribute ideas. Listen/acknowledge ideas.
  - Monitor and encourage; if needed, ask a speaker to share clearly and audibly. If needs be, interrupt respectfully and have her repeat points that may NOT have been heard by all.
  - Summarize what the speaker has said and, if pertinent, obtain a decision on the matter.
  - Halt aimless discussion by assigning further study.
  - Avoid hasty decisions/actions due to a tight time schedule. Rather, plan to continue discussion at the next meeting.
  - Invite constructive criticism and disagreement.
  - Give every member the opportunity to report on her area.
3. Responsibility: Give every member at least one specific job or responsibility.
4. Respect: members/self. To this end, meetings MUST:
  - Start on time.
  - Be of a reasonable length of time.
  - Have an agenda of topics to cover.
  - Be well-organized.
  - Have a purpose to be achieved.
  - Use parliamentary procedure as appropriate.
5. Compliment and recognize members personally and in front of others.
6. Call a special meeting if plans change. Directors do not do it “all by themselves.”
7. See that the Committee Agenda/Minutes Forms are filled out at each meeting and turned into the president or director: committees.
8. Try new things. Don’t rely on what the previous officer/chair did. Forge on and expand!
9. For the chairman: learn to delegate. Don’t overburden yourself.

#### Accountability for Committee Participation

Often chapter leaders struggle to engage members and motivate them to join in their assigned committees. As a committee leader, remember to keep your committee fully informed of upcoming events and tasks with enough advance notice to be able to participate.

Here are some additional suggestions for engaging your members in committees, please choose the methods that work best for your chapter's needs:

- Focus on positive reinforcement instead of fines or SORs.
- Educate the chapter regularly on the committee system and why it is important.
- Incorporate committee work hours into your chapter's points system.
- Bring treats to committee meetings!
- Remember to encourage bonding and inclusion in your committee.
- Track committee hours via a Google form or Google doc; members may self-report.
- Hold committee meetings immediately following other chapter meetings/events.
- Recognize exceptional committee members publicly during chapter.
- Make participation between committees competitive; whichever committee earns the most points (via projects and event attendance) will receive a desirable prize.

## Frequently Asked Questions

### General Slating, Elections and Transition FAQ

When is the best time for a chapter to schedule elections?

Timing for elections is set in the bylaws and standing rules for each chapter but must happen in the fall semester or winter term. The best time to hold elections varies for each chapter and is dependent on factors such as deferred recruitment, Inspiration and Initiation, class size and campus calendar. It is important to schedule elections and officer transitions at a time that will allow the chapter to continue functioning at its maximum level.

Tips for scheduling elections:

- Be sure there are two-three weeks after elections and before finals to hold effective transitions.
- Avoid midterm or final exam time as members will be focused on academics rather than the election and transition process.
- Avoid mid-term officer installation which can create confusion as incoming officers lead events originally planned by outgoing officers.

Can the leadership skill presentation count as another programming requirement?

No, this does not count as a DG Dialogue program. This is an optional program for members interested in assuming a leadership position.

Can members in poor standing vote or participate in the election of chapter officers? No, members in poor standing may not vote in the election of officers. They should participate and benefit from the chapter education on elections. They may also submit a Recommended Slate form to the Nominating Committee.

What is the best way to educate the chapter regarding officer position, their specific responsibilities and general officer responsibilities?

This chapter education can occur in several ways. A presentation of officer positions that your chapter has is a great place to start. Be sure to include the weekly time commitment for the position, skills that contribute to success in the position and the responsibilities/tasks of the position. Having the current officers speak to the chapter can be beneficial as could holding a forum or speaker panel to discuss topics related to being a successful Delta Gamma chapter officer.

Don't forget to make the chapter aware of attendance requirements, transition meetings and workshops and any regional or international Delta Gamma institutes or trainings.

Can new members vote or participate in the election of chapter officers?

New members cannot vote until they are initiated. They should participate and benefit from the chapter education on elections. They may also submit a Recommended Slate form to the Nominating Committee. They will be automatically included in the electronic slating steps on Anchorbase if their information is entered in the Add New Members task in Anchorbase.

New members may not be slated/nominated or be elected/appointed to positions. Fraternity policy specifies that new members cannot hold office. If chapters are expecting new members to become directors, the chapter needs to plan accordingly and coordinate S/E/T dates with Inspiration and Initiation.

Can sophomores be presidents?

Only in rare cases are sophomores approved by the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator to be candidates for president. Fraternity policy mandates that a woman must have been a member of a collegiate chapter for more than one grading period to be eligible for the office of president. Ideally, a woman is elected in her junior year. If the sincere effort to identify a qualified junior candidate or woman who has been a member longer than one grading period is unfruitful, the RCS/CAC/NCC should be contacted prior to the Nominating Committee meeting to explore options.

I want to be president but do not want to live in the chapter house. Is this ok?

The live-in policy as specified in the chapter's bylaws and standing rules must be followed. Any officers that are required to live in based on the chapter bylaws and standing rules must live in.

Can a woman who is going abroad for a term hold an office? Or, can a woman who is graduating in the Spring hold an office?

Officers are expected to complete a full term of office; therefore, only women who will be on campus and can carry out the duties of the job should be slated, elected or appointed. In special circumstances where it is in the best interest of the chapter to consider such an arrangement, the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator should be consulted for advice and approval.

Do "Honor Board member positions" count as one of the five officers a member can be interested in?

Yes, the electronic form allows for a member to select five positions that she is interested in, with Honor Board positions included in this list.

Can a member be slated for a vice president position and also for an Honor Board position?

For chapters over 75 members, members should not hold dual roles. That is, a member slated for a vice president position should not be slated for an Honor Board role and vice versa.

For chapters with 75 or fewer members, vice presidents may be slated for Honor Board positions.

How do we know which officer positions our chapter has? Can we add other director positions to our officer roster? Do we have to fill each of these officer positions?

The officer positions that your chapter has are specified in the chapter bylaws and standing rules. You may not elect or appoint members to positions not listed in this document. If you feel that other officer positions would benefit your chapter, you will be able to add these into your chapter bylaws and standing rules during the spring semester during the bylaws and standing rules revision process. You should elect or appoint members to each of the positions listed in this document.

## Nominating Committee FAQ

When can the chapter elect the sophomore and junior class members of the Nominating Committee? Anytime, however it is most efficient to elect these members when you return to school in the fall. You will then know which members are returning and are in good standing to be considered for these positions.

What if one of the members of the Nominating Committee can't make the meeting? Can we substitute another officer or director?

No other officers or members may be added to this committee. If a member has an unavoidable conflict, consider changing the timing of the Nominating Committee meeting(s) so that all members can participate. Don't forget to consult with your ATC, who is also a member of Nominating Committee.

## Slating FAQ

What happens if one of the Nominating Committee members at large needs to resign before the Nominating Committee meets?

If one of the Nominating Committee members at large needs to resign, she is replaced by the woman who got the second highest number of votes when she was elected. If she was the only person interested, the president needs to make announcement to the chapter and the chapter elects a new member at large from the eligible chapter members.

Can a member of Nominating Committee be recommended for a position during the slating discussion? If Nominating Committee would like to consider a member of the committee for a position she did not previously express interest in, the member must first be willing to consider the nomination and then leave the room before any discussion occurs. It is not recommended for a member of Nominating Committee to be present for part of the discussion on a particular position and then be nominated for the position.

Does Nominating Committee only consider women who expressed interest and submitted Officer interest forms when creating the slate?

If a member did not express interest in holding any position, Nominating Committee may still consider her for a position given the following: she meets the requirements for holding a position and she is approved by the ATC. Even though a member only expresses interest in certain positions, she could still be considered for any position. The role of Nominating Committee is to select the best member for each position.

What happens when Nominating Committee calls to offer the slated position to a member and she needs time to think about it? Can a member of Nominating Committee talk with her about her decision?

It is up to Nominating Committee's discretion to decide to give some additional time to a member if she needs some to make the best decision regarding an offered slated position. Five to ten minutes is acceptable. Remember that Nominating Committee cannot move forward discussing the next position until a woman is slated for the current position. So, any time a member takes to decide, will be non-productive Nominating Committee time.

A member of Nominating Committee may speak with the woman, however as Nominating Committee discussion is confidential, she may only speak of the position's responsibilities and NOT of why Nominating Committee felt she was well qualified, the best candidate, etc.



What happens if the member that Nominating committee wants to slate, doesn't answer her phone? Nominating Committee should announce, prior to the Nominating Committee meeting, that ALL members should have their phones handy during their meeting. Should the desired member not answer her phone, Nominating Committee should use other means to contact her Facebook messages, etc. are other possible ways to reach the member.

## Elections and Challenges FAQ

Can email be used for voting?

Please see the electronic voting guideline listed in Elections Procedure above. This is the approved Fraternity Electronic Voting Guidelines.

Can additional nominations be made "from the floor" during the vote to elect in chapter meeting?

There are no true nominations from the floor during the annual elections meetings. All challenges to the slate must be made and approved by the advisory team chairman prior to the actual election. When the slate is posted or distributed electronically, the chapter president should post or include written directions describing how challenges to the slate are to be made.

Who can challenge a slated position?

Any member in good standing and who meets the academic requirement to hold an officer position can challenge a slated position. However, it is not ideal for a member to accept one slated position and then challenge for another position. Additionally, every challenge must be approved by the ATC.

In what situations might an ATC not approve a challenge (or candidate)?

If the ATC has concerns about the ability of a member to fulfill the duties of office based on past experience, she may not approve the member to run for or challenge a position. It is difficult to list specific reasons for not approving a candidate/challenge, however an ATC is within her right to do so if she has concerns.

A member who was slated has been challenged, what can she do to still have an opportunity for a slated position?

After the initial challenge period specified in the Elections Procedures in the bylaws and standing rules has passed, a member who is slated and challenged can challenge for another position *only* if she has originally indicated interest in that position on the officer interest form. These challenges must be completed within 24 hours after the initial challenge period has ended. The ATC must still approve all challenges before the chapter vote.

A woman has decided to challenge the slate and wants to make a short speech at the vote to elect chapter meeting. Is this permissible?

This protocol must be addressed in the chapter's standing rules. The standing rules must reflect the floor nomination procedure and amount of time allowed for a speech, which is usually one minute per person. All comments must be positive. All candidates are afforded the same opportunity to address the chapter. This information must be discussed, reviewed and approved by the advisory team chairman and the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator prior to election.

What happens if there is a tie during elections?

Winning an election means that the candidate has won a majority of the votes cast. Ballots are repeated until a clear winner has been elected. If the chapter president did not vote, she may vote to break or

create a tie as defined by Roberts Rules of Order.

There is more than one candidate for the chapter president position - the slated candidate and the candidate nominated via a challenge to the slate. After the vote to elect is taken, what can we do with the woman who loses? Is she able to run for a vice president position?

If the woman has challenged another position, she is eligible for that position and the election will continue as usual. If she did not challenge for another position, the Nominating Committee may appoint this member to a director position or allow her to oversee a special project. The window for challenges to the slate will already have passed. She cannot be nominated from the floor for a vice president position once elections are underway (unless NO ONE is slated, and this special procedure will involve the ATC and/or RCS/CAC/NCC input).

What if the person slated as vp: programming, for example, challenges the slate for vp: communications and wins the election?

Positions are elected in slated order, so if a woman slated for one position (vp: programing in this example) is nominated for a position higher in the slated order (vp: communications in this example), this process could create a vacancy. If another candidate had already challenged the slate for the position in which the slated candidate is no longer a candidate, the chapter would vote on the candidate that remains. If no candidate had challenged the slate prior to the vote-to- elect meeting, this position would not be filled at this time but would revert to the nominating process. The Nominating Committee could entertain additional resumes and the timeline would need to be announced to the chapter. The same process would be followed: Nominating Committee would meet to slate a candidate, post the slate, wait the number of days specified in the chapter's standing rules, accept nominations from the floor if there are any and then bring the position before the chapter for a vote.

What are special elections?

Special Elections are the process by which a vacant officer position is filled. These occur at non- election time of the year (for example, after winter break, after summer break, other random times during the semester). Although called special "elections," voting by the chapter does not always occur.

When does chapter management team appoint a member to an open position?

Chapter management team may appoint a member to any position which is vacant (vice president, director or Honor Board) if there is less than three months left in the officer term. For most chapters, three months left in a term would be mid-August. For more information regarding this question, please refer to the "Special Elections Procedures" section of this handbook, as proper procedures are outlined there.

What should chapter management team members discuss when appointing a member to a vacant officer position?

Chapter management team members should follow the same discussion protocols as Nominating Committee does. They should keep their comments positive. They should consider the member's qualifications for the position. They should consider the member's leadership abilities. If multiple positions are available, positions should be filled in the order of elections specified in the chapter bylaws and standing rules.

Does chapter management team have to appoint a member to fill a vacant officer position or can elections be held instead?

The proper procedure must be followed. Therefore, if there are three or more months left in a term, a special election must be held, following the outlined procedures. Whereas, if there are less than three

months to the end of the term, then CMT may appoint women into officer roles. For extenuating circumstances, the chapter should reach out to their RCS/CAC/NCC and discuss the best way to proceed.

Can the president and/or advisory team appoint members to open officer positions? No. This appointment is discussed and decided upon by all members of the chapter management team. Advisers may be involved in the process and discussion but should not make the final decision.

## Transition FAQ

Can you separate Individual Officer Transitions into two steps?

Transitions are most effective when conducted according to the procedures in this manual. The Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator may approve adaptations to the outlined process but only when such modifications are in the best interest of the chapter. The outgoing president should be supervising these meetings to ensure that appropriate materials are being discussed and the incoming officers are prepared to hold their officer positions.

Can you combine Officer Transition with the Formal Transition meeting?

Transitions are most effective when conducted according to the procedures in this manual. The Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator may approve adaptations to the outlined process but only when such modifications are in the best interest of the chapter.

Should advisers attend transition meetings?

Yes, it is advisable to have advisers present during transition meetings.

## Anchorbase FAQ

What purpose does Anchorbase serve?

Anchorbase is the system used for reporting, forms and chapter operations. It also presents live data to volunteers to better manage our collegiate chapters and alumnae groups.

To add the election steps to the Anchorbase calendar, enter election events in the same way that other events are added to the calendar. Refer to the S/E/T Timeline in this handbook for the proper timing of each election step. Election events should be added to a chapter's calendar during their calendar planning and approval period.

Where do I find help on the slating and elections process in Anchorbase?

Please see the Slating, Election and Transition timeline on page 7 of this handbook. For specific questions, email [Anchorbase@deltagamma.org](mailto:Anchorbase@deltagamma.org).

How do new officers log into Anchorbase?

Officers will gain access to Anchorbase once their start date begins. They will use their DG website username and password to log in.

When should new officers log into Anchorbase?

Individual officer transitions are a great time for outgoing officers to show the incoming officers how to use Anchorbase for the first time. The outgoing officer will be able to show the incoming officer vital parts of Anchorbase related to their responsibilities.

Note: The outgoing president will need to update the officer roster BEFORE incoming officers will have access to Anchorbase. Therefore, if transitions are occurring before installation (which they should) then the incoming officer will not yet have access to Anchorbase, unless they held a previous office.

How will new officers assume where old officers left off?

It all begins with a proper transition. Show the new officer where to find her tasks, calendar and roster.

What information can officers find on Anchorbase?

Officers can find chapter specific information such as the chapter calendar, member roster, officer roster, advisory and regional team roster and roster of House Corporation Board members. Completed and Upcoming Tasks are also available to view.

Where do I find Anchorbase help and assistance?

The Help button in Anchorbase is the perfect place to start. You can also email [Anchorbase@deltagamma.org](mailto:Anchorbase@deltagamma.org) or your RCS/CAC/NCC for assistance.

## Transition Workshops

As mentioned throughout this handbook, thought-out and well-done transitions are crucial to the success of a chapter. Before slating and elections occur, the chapter president should ensure both transition workshops are scheduled on the calendar. All chapter members should be aware of these dates, especially if they are interested in a position, or are an outgoing officer, as their attendance is required at these workshops. In this section you will find basic outlines of what should occur during both parts of a transition and materials that should be used. If your chapter wishes to add items or amend any of these transition workshops, please contact your Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator to gain approval before doing so.

### Part I - Delta Gamma Officer Transition

(Transition Individual Conference, step 16)

When:

- Completed before Formal Transition Workshop and before the semester ends.
- Conference to last approximately 2 -3 hours and can be scheduled as 1 or 2 sessions.

Who Attends:

- ALL incoming officers and directors.
- ALL outgoing officers and directors.
- ATC and/or chapter advisers, if possible.

Why:

- To review and exchange information, to develop continuity of leadership and chapter administration with adherence to Fraternity policies and procedures. Individual appointments are made between outgoing officers/directors and incoming officers/directors. Incoming vice presidents must attend the individual transitions of directors for whom they are responsible. Examples: vp: member education attends transition of director of new members, and vp: programming attends transition of director of scholarship and director of rituals.

At conclusion of the conference, each officer (both outgoing and incoming) must use the officer transition checklist to ensure that transition was complete.

## Outgoing Tide Evaluation

Name of outgoing vice president or director:

Office:

Date:

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

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

List three important "pieces of advice" for the incoming officer:

List any outstanding items (including anything overdue tasks) that still need completion prior to your leaving office:

As an outgoing vice president or director of \_\_\_\_\_ chapter, I promise to assist the newly elected officer in any way that I can.

Outgoing Officer Signature and Date \_\_\_\_\_

RETURN THIS FORM TO CHAPTER PRESIDENT FOR FILING.

## Incoming Tide Evaluation

Name of incoming vice president or director:

Office:

Date:

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

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

List three areas in which you foresee possible problems in your office:

List possible solutions to the above three problems:

As an incoming vice president or director of \_\_\_\_\_ chapter, I promise to ask the assistance of the outgoing officer or chapter president whenever I need help.

Outgoing Officer Signature and Date \_\_\_\_\_

RETURN THIS FORM TO CHAPTER PRESIDENT FOR FILING.



## Officer Transition Checklist

Preparation prior to conferences should include:

Retiring vice president or director has:

- Organized the electronic files, officer resources, and appropriate hard copy materials to transfer to the incoming officer
- Prepared the “outgoing tide” officer evaluation sheet for incoming officer

Incoming vice president or director has:

- Read CCOM
- Reviewed Collegiate Officer Quick Guide and handbooks pertaining to office
- Reviewed chapter’s bylaws and standing rules
- Prepared the “incoming tide” officer evaluation sheet

Individual officer conference agenda:

- Collegiate Officer/Director Quick Guide
- CCOM
- Officer Specific Handbooks and Policies, as noted on the Collegiate Officer/Director Quick Guide
- Chapter Bylaws and Standing Rules (note suggestions for future revisions)
- CMT Planning Tool
- Officer role as it relates to committees
- Officer Budget (note actual spending to date vs budget)
- Anchorbase navigation and explanation of pertinent tasks required of office
- Responsibilities to Honor Board
- Outgoing and Incoming Tide evaluations
- Questions that have arisen
- advisers and handbooks as references

Outgoing officer and date \_\_\_\_\_

Incoming officer and date \_\_\_\_\_

RETURN TO CHAPTER PRESIDENT PRIOR TO FORMAL TRANSITION WORKSHOP



## FORMAL TRANSITION WORKSHOP (step 18)

The purpose of the Formal Transition Workshop is for a new CMT to come together to build their team dynamic, learn about Delta Gamma and their roles and responsibilities within the chapter, create goals, and develop more skills related to their new leadership role. The facilitator of this workshop should be the incoming chapter president in conjunction with the ATC (or other incoming officers). A Fraternity Visitor may also help facilitate this workshop. Below are steps to prepare for the workshop and a guide on how to read the curriculum.

What to do to prepare for the Formal Transition Workshop:

- Read through the facilitator’s guide and divide sections by facilitator if there is more than one woman facilitating. Please note, it is encouraged that more than one person facilitates this workshop. It could be the incoming chapter president and advisers, the incoming chapter president and other incoming officers, or a mix of both. During this preparation, choose which activities you will be doing in Parts I and IV.
- Identify, for Part II, whether you have a RCS, CAC or NCC, a RFS or NCFC, and a RCRS, CRC or NCRC. Provide the contact information for at least your RCS/CAC/NCC. Also, identify the names of your local advisers and House Corporation volunteers. Feel free to add this information and a photo to the Formal Transition Workshop PowerPoint.
- Request that all participants bring their laptop/tablet. Ensure that everyone knows their [www.deltagamma.org](http://www.deltagamma.org) login information. If you do not know your DG website login, contact [DG-EO@deltagamma.org](mailto:DG-EO@deltagamma.org).
- Ensure that you and all participants know your Anchorbase login information.
- Print out any additional necessary materials.
- Ensure the room you are using for the workshop has Audio/Visual capabilities available.

Curriculum Key:

Total Time	The amount of time the section should take to complete.
Room Setup/Supplies	Describes how to setup for each activity and the supplies that are needed.
<i>Italics</i>	Marks curriculum that a facilitator should say out loud.
Plain Text	Indicates instructions for the facilitator.
<b>Bold Text</b>	Marks a variation in curriculum because it is not applicable to each chapter.
PPT	Marks when a PowerPoint is being used and when a new slide should be clicked to.

## Formal Transition Workshop Outline

Below you will find a brief outline of all the parts of the Formal Transition Workshop with total time for each part.

### Part I - Team Building

Total Time: Depends on activities, should last no longer than 30 minutes

Choose one or two of the following activities:

1. Find an Object
2. Blind drawing
3. Line Up
4. M&M Share
5. This is Better Than That

### Part II - Delta Gamma Structure

Total Time: 1.5-2 hours

Section 1 – CMT Structure & CCOM Review

Section 2 – Delta Gamma Structure

Section 3 – Testing Knowledge

\*If you are including a break for lunch during this workshop, it would be appropriate to take lunch between parts II and III. In addition, if you want to break this workshop up into two days, it would be appropriate to split the workshop in-between parts II and III.

### Part III - Goal Setting

Total Time: 2.5-3 hours

Section 1 – Evaluating your Chapter

Section 2 – SOAR Analysis

Section 3 – Creating SMART Goals

Section 4 – Action Planning

### Part IV – Skill Development

Total Time: 40 - 60 minutes

Choose two of the following sections:

Section 1 – Organization

Section 2 – Working as a Team

Section 3 – Presentation Skills

### Part V – Leadership Development

Total Time: 15 minutes

## Part I: Team Building Activities

Total Time: Varies by activity, Part I should take no longer than 30 minutes

Room Setup/Supplies:

- Varies by activity

Learning Objectives:

- Build connections between officers
- Develop trust among officers
- Identify strengths within each other and themselves

Special Instruction: Choose one or two of the following five activities. If you have extra time, you can use one of the remaining three activities.

### Find an Object

Total Time: 30 minutes

Ask each officer to bring to the workshop an item that represents their thoughts/feelings/attitude toward their upcoming term as an officer.

*We are now going to share the item you brought that represents your thoughts, feelings, or attitude toward your upcoming term as an officer. Please share what item you brought and explain why you chose the item.*

Each officer should share their item, and why they chose the item. As a facilitator, you still should participate in this activity. To model how the activity should be done and how each participant should be honest and vulnerable while sharing, consider sharing first.

### Blind Drawing

Total Time: 10 - 15 minutes

Room Setup:

- Have two chairs sitting back to back, so when the women sit in the chairs, they cannot see each other.
- A few sheets of blank paper and a pencil should be on the table that is in front of each of the women sitting in the chairs.

Ask for two volunteers from the group. Once you receive the volunteers, explain that they will be representing the group as the “artists”. Ask the women to sit in one of the chairs. Then have the group count off to two. Divide the group in half by their number, and assign each group to one of the artists.

*Each of the groups will choose an object. You will then stand with your back facing your artist. The group will describe the object for your artist to draw. The only rule is that you cannot tell your artist what the object is, you can only describe it. Now, please silently pick an object.*

If the groups struggle to find an object, suggest a spiral-bound notebook, a water bottle or a pen that someone has in their backpack or bag. Once an object is chosen, ask the groups to begin describing the object to the “artist”.

If you would like, you can give the activity a time limit, or wait until the drawings are completed. Remember that this activity should not run longer than 10 – 15 minutes, so ensure you have enough to debrief the activity.

Once you have reached the completion, ask the artist to show the rest of the group her drawing. If you would like to make this competitive, the facilitator can judge whose picture is more complete at the end of the time.

Ask the following questions to debrief once the activity is over:

1. *Was this activity challenging? Why or why not?*
2. *To the artists: How did it feel not being able to see what the group was looking at? To the groups: How did it feel not being able to see what the artist was drawing?*
3. *How do you think this relates to being an officer in the chapter?*
4. *What situations do you think you may be “blind” during or going into while being an officer?*

### Line Up

Total Time: 20 minutes

Room Setup:

- Ensure there is enough open space in the room for women to walk around without tripping

Ask members to go the open space in the room and stand in a straight line.

*You may no longer speak. Please now silently arrange yourselves by birthday, month then day, within the year. January at one end of the line all the way to December.*

Allow members to complete the activity. Once members have confirmed with you that they think they are in the right order, ask each member, starting with the January side, to say her birthdate out loud.

*Next, I would like you to please arrange yourselves, alphabetically, by middle name. “A” should be at one end of the line, all the way to “Z”.*

Allow members to complete the activity. Once members have confirmed with you that they think they are in the right order, ask each member, starting with the “A” side, to say her middle name out loud.

*For your last line, I would like you to place yourselves in order of smallest shoe size to largest shoe size. You must do this silently and without using your fingers to hold up numbers. For example, you cannot hold up 8 fingers, if you are a size 8.*

Once the women have confirmed that they are complete, ask the women to say their shoe size, out loud, starting with whoever believes they have the smallest shoe size.

Once this is complete, ask them to return to their seats to debrief.

Ask the following questions to debrief:

1. *Was this activity challenging? Why or why not?*

2. *How did you compensate for not being able to speak? How did you compensate for not being able to use physical signs?*
3. *How do you think this activity relates to being an officer?*
4. *In what situations do you think communication will be difficult during your term as a chapter officer? Who would you be communicating with in these situations? Why would it be difficult?*

At the end of the team building activities feel free to give all participants a 5-10-minute comfort break. Once the break is over, proceed to Part II.

### M&M Share

Total Time: 10 – 15 minutes

Room Setup/Supplies:

- A large enough bag of M&Ms for each participant to take however many she would like.

Open the bag of M&Ms and pass it around to the participants. Ask them to take a small handful of M&M's and to ensure that everyone gets some. Instruct them to not eat the M&Ms. Once all the women have taken some M&Ms, begin with the instructions.

We are now going to share about ourselves:

For every red colored M&M share a favorite memory of a birthday you have had

For every yellow colored M&M you have share a favorite movie or television show

For every orange colored M&M share a favorite food

For every brown M&M name someone famous you would like to hang out with

For every green colored M&M you have name a place you would like to travel to

For every blue colored M&M you have share a favorite thing about Delta Gamma.

Go around the group and allow women to share according to the color of M&Ms they have. Make sure that you are paying attention to time, as this activity should only take 10 – 15 minutes.

### This is Better than That

Total Time: 10 minutes

Room Setup/Supplies:

- Ensure there is enough space for groups of women to sit together in the room like in a circle around a table.
- A coffee mug, a pair of socks, a towel and a phone charger should be brought and placed somewhere that everyone in the room can see them.

Number the women off one through four and then instruct the women to sit in groups by number. Explain to women that they are on a deserted island and the four items in front of them are the only items that have washed to shore with them. Ask them to rank the four items in order of usefulness.

Give them about 5 minutes to discuss as a team and then when time is up ask each team to share their answer and explain their choices.

Once everyone has shared, facilitate a group discuss using the following questions:

1. What was the process like for your group to decide how to rank these items? Were there any disagreements? If yes, how were they resolved?
2. After hearing others' choices and reasonings would anyone change their groups' answers? Why or Why not?
3. How do you think this activity relates to being an officer?

## Part II: Delta Gamma Structure & Individual Roles

Total Time: 1.5-2 hours

### Room Setup/Supplies:

- It would be preferred that you have AV available and are able to setup a projector with the Formal Transition Workshop PowerPoint (found on Delta Gamma Library). If not, ask the women to bring their computers to follow along with the PowerPoint. The PowerPoint should be sent out ahead of time if AV is not available in the room.
- Each woman should have a laptop or some electronic device, so she can access the internet. Ask her to pull it out at the beginning of this session.

### Learning Objectives:

- Define responsibilities of their office, and the office of others, within their chapter.
- Identify women who are resources to them within and outside of their chapter.

### CMT Structure and Review of the CCOM

Total Time: 1 hour – 1 hour and 15 minutes

[PPT] *To begin our transition workshop, we are going to learn and review Delta Gamma structure, beginning with the internal structure of our chapter. The Chapter Management Team is made up of nine officers:*

- *chapter president*
- *vp: social standards*
- *vp: finance*
- *vp: communications*
- *vp: programming*
- *vp: member education*
- *vp: membership*
- *vp: Panhellenic*
- *vp: Foundation*

*Each of these officers have directors that assist with specific responsibilities of that office. As you can see in this organization chart, not every chapter has every officer position. To learn more about what responsibilities each officer and their team has, we are going to download the Collegiate Chapter Officers Manual from the Delta Gamma Library.*

At this time, please follow the below instructions:

- Go to [www.deltagamma.org](http://www.deltagamma.org) and click the “Login” button in the top right-hand corner.
- Using your information, log in to the website.
  - If an officer does not know their login information, ask them to email [DG-EO@deltagamma.org](mailto:DG-EO@deltagamma.org) and request that information. For this activity, have them look at someone else’s computer or have another officer email them a downloaded version of the CCOM.
- Once everyone is logged in, go to the top right-hand corner and click on “Library”

- In the “Quick Search Bar” of the Library type “Collegiate Chapter Officer Manual” and then search.
- Once your options pop up, find the “Collegiate Chapter Officer Manual” and select it.
- Click “Download” and save the document to your computer.

After you have confirmed that everyone has download this handbook, please proceed.

[PPT] *You should save this handbook and reference it when you have questions regarding your position. You should have seen this manual during your other transitions, if not, that is ok because we are going to have an introduction to it now. Please find your position description in the CCOM. As you read through your position description, write down the following on a blank piece of paper or in a notebook:*

- *anything that you were not aware you were responsible for*
- *anything you would like to improve within your position*
- *anything you are excited to do in your position*

*If your position is specific to our chapter and there is not a section in the CCOM for it, take this time to please write down:*

- *what your responsibilities are*
- *how you would like to improve your position*
- *anything you are excited to do within your position*

*We will share as a group after everyone is finished.*

Allow officers to read through their sections. After everyone is done, starting with the president then on to her directors, and proceeding through the rank, have each officer/director share what she wrote down.

*Thank you everyone for sharing. We are now going to review the three major “boards” that exist in our chapter. These are Committees, Honor Board, and Evaluation Committee (EVC).*

[PPT] *The purpose of Committees is to help involve general chapter members in the operations of the chapter and assist officers and directors within their roles. Committees allow all members of the chapter be responsible for the success of the chapter. Every chapter member and new member should participate in a committee.*

Review what officers and directors have required committees from the PowerPoint.

Special Note: If she is available, it is recommended that the Honor Board Adviser facilitates the information presented and the discussion around Honor Board. If she is not available, it is recommended that someone who has served previously on Honor Board facilitates this next section.

[PPT] *Honor Board is made up of the vp: social standards, who chairs the board, the chapter president, a junior member, a sophomore member, and a member at large. The Advisory Team Chairman or Honor Board Adviser may sit on the board as a non-voting member. Only one of these women may sit on Honor Board. If an HBA is appointed, the ATC is not privy to Honor Board matters. The purpose of Honor Board is to assess chapter morale, identify trends, and make recommendations to CMT on how to foster positive chapter morale, address trends, and enforce the Statement of Obligation. What occurs in Honor Board is confidential within Honor Board and may not be shared outside of the board, or appropriate officers. Over*



*the next few slides, we are going to discuss how you may interact with Honor Board and give a very high-level overview of Honor Board procedure. Please note that there are very specific details that go into Honor Board, and this is very high level. If you have specific questions, we can discuss those outside of the workshop.*

*[PPT] The most common way you will interact with Honor Board is through automatic procedure. Automatic Procedure is triggered when an Automatic Procedure Notification (APN) is filed by a chapter officer. You can see on the screen which officers have the ability to file an APN and why they would do so. For members who receive this notification, they are placed on probation for a predetermined length of time. To review how much time, and what the terms of probation are, please reference the Honor Board handbook, or ask the vp: social standards.*

Review the reasons why an APN would be filed, and which officer would file the APN.

*We are also going to review what an APN looks like.*

Follow this link: <https://www.deltagamma.org/library/formApplication/honor-board-automatic-probation-notification> or sign into the Delta Gamma Library and search for APN. Review the document going over what needs to be filled in on the form for it to be complete.

*When this form is complete, the appropriate officer sends it to the member, copying the vp: social standards and Honor Board Adviser.*

*[PPT] There are times when multiple APNs being filed leads to the second kind of procedure Honor Board follows, Standard Procedure, beginning. Standard Procedure is followed when a Statement of Obligation Review (SOR) is written. If any of the below situations are true, then the officer who presides over the APN should write an SOR on the member to begin Standard Procedure.*

Review the reasons an SOR would be written after APNs are filed, which are on the PowerPoint. At this time, you may also pull up a blank copy of an SOR to show women what it looks like.

*[PPT] You can find a Statement of Obligation Review, or an SOR, on the Delta Gamma website Library. An SOR can also be written if a member violates any part of the Statement of Obligation. Reasons for an SOR being written may be a sister cheated on a test, she acted unsisterly towards others in the chapter, she was underage drinking, etc. Any member/new member of the chapter may write an SOR if they feel that another chapter member/new member has violated the Statement of Obligation. When the vp: social standards receives an SOR, Honor Board must review it. They hold what is called an "Allegation Assessment". During this, Honor Board discusses the SOR and votes on whether a formal hearing should be held. If they vote in the affirmative, a formal hearing is held. It is important to note that, when in doubt, a formal hearing should always be held; it is important to give the member an opportunity to share her side of the story and be heard.*

*When a formal hearing is scheduled to occur, a member will receive a copy of the SOR that has been filed, along with the information regarding when her formal hearing will be held. During the formal hearing, the Formal Hearing Minutes, found in the Delta Gamma website Library, will be read, along with the violations, and the member will have the opportunity to read a written statement she has prepared. A discussion between Honor Board and the member will then ensue. Let's take a break from procedure and talk about what we think this conversation looks like. Who has some ideas of what kinds of questions Honor Board may ask the member?*

Allow women to share answers regarding what the discussion between Honor Board and a member may look like. Ensure that you are reinforcing that Honor Board's purpose is to uphold the Statement of Obligation, so during the conversation with a member, Honor Board may have to ask difficult questions. Possible questions/conversation points may include:

- Tell us your side of the story. What happened that day/night?
- Do you understand why you were asked to speak with us today?
- Can you tell us why you think you are here?
- Looking back, what could you have done differently in the situation?
- Is there anything you would like us to know specifically about your experience in Delta Gamma?

Once you have collected a variety of questions say, *Thank you so much for participating. All of these were good suggestions, but please remember, Honor Board does not have specific questions they must ask every woman. Each formal hearing will look different. Once a member has spoken with Honor Board, they will ask her to momentarily leave the room and deliberate. What are some ideas of what this deliberation may look like? What will Honor Board discuss during this time?*

Again, allow women to share answers regarding what the discussion between Honor Board may look like. Some appropriate suggestions include:

- Review the member's answers to the questions asked and gaging if she is showing remorse for her actions.
- Review the member's answers to the questions and deciding whether she understands the violation that occurred.
- Reference the member's past Honor Board history, if applicable.

Once you have collected a variety of answers say, *Thank you for those suggestions. As a reminder, everything this is discussed in Honor Board is confidential. Therefore, although Honor Board is expected to have a robust discussion regarding the member and the violation that occurred, no one else in the chapter is privy to what was discussed during the deliberation.*

[PPT] *After the deliberation, Honor Board makes a decision regarding some type of sanction to give the member. They will then call the woman back in and share the sanction. There are a lot of different variety of sanctions that can be given. Some of the most common are on the screen.*

Review the information on the screen. Once it is reviewed, remind the women that if they have specific questions about Honor Board, they can always speak with the Honor Board Adviser, vp: social standards, or come in to speak with Honor Board during a meeting.

[PPT] *Evaluating Committee, or EVC, is made up of vp: membership, who chairs the committee, the chapter president, the director of recruitment/COB, the director of recruitment records, the Advisory Team Chairman and the membership adviser. EVC is responsible for executing the logistics of recruitment (both primary and COB) with the help of crews, for acting as a confidential source for members to express concerns regarding PNMs, for enforcing all recruitment Bylaws and Standing Rules, and for coordinating, counting and submitting all votes and lists to recruit new members in the chapter.*

[PPT] *As you heard, there are alumnae that serve on various boards and committees in our chapter. Our chapter has committed alumnae that volunteer their time to help support our chapter, and they make up our Advisory Team. Let's see who these women are.*

Special Instruction: For this activity, you can either login into Anchorbase and on the left-hand side, select "Officers". Proceed through each adviser that is listed. Tell the chapter her name, and which officer(s) she supports. Once you are finished please go back to the PowerPoint. Or you can list out the advisers on the PowerPoint and include a photo, if she is comfortable providing one.

Special Note: If your chapter does not have a House Corporation Board, please proceed to the slide title "Delta Gamma Fraternity & Regional Volunteers".

[PPT] *We also have alumnae who volunteer to be on our House Corporation Board. House Corp. serves essentially as our chapter's landlord, and therefore operates separately, but in conjunction with our chapter. The chapter president, vp: finance, and director of house management also serve on this board, to ensure that a collegiate perspective is represented. Let's meet the alumnae that serve on our House Corporation.*

Special Instruction: For this activity, you can either log back into Anchorbase and on the left-hand side, select "Officers". At the bottom of this list, you will see the names of the women that serve on your House Corporation Board. Please go over the names of these women and their titles. Or you can list out the names of the women on House Corporation and include a photo, if they are comfortable with providing one.

### Delta Gamma Structure

Total Time: 15-20 minutes

[PPT] *Lastly, we are going to review the bigger picture of Delta Gamma's structure. Delta Gamma Fraternity is governed by an International Council. The International Council creates and endorses initiatives for both alumnae and collegiate members of Delta Gamma to help Delta Gamma continue to be a strong international organization.*

[PPT] *Delta Gamma also has Fraternity Directors, each who specifically oversee a certain area of the Fraternity, such as programming, finance, etc. These Fraternity Directors create initiatives and interpret current policies and procedures that fall under their expertise.*

[PPT] *All collegiate and alumnae chapters are also organized by region. Each of these regions have team members that oversee specific functional areas for that region. All of these women are volunteers and give up their time to support and assist Delta Gamma. These volunteers are supported by staff at Executive Offices. As a collegiate chapter, we will most often work with our regional team. We are going to quickly go over what positions on the regional team we may interact with and how those volunteers support our chapter.*

*Each region is overseen by a Regional Director.*

Special Note: If possible, you should have your RCS/CAC/NCC's name and contact information to provide to the officers.

If the chapter has an RCS: *Each region also has several Regional Collegiate Specialists (RCS). We have one RCS assigned to our chapter. She approves our calendar, our BLSRs, oversees all Honor Board proceedings, and is a general resource for all things collegiate chapter related.*

If the chapter has a CAC: *Each region has several Regional Collegiate Specialists. These women work with a few different chapters in the region approving their calendars, BLSRs, overseeing all Honor Board proceedings and is a general resource for all things collegiate chapter related. We have a special volunteer assigned to our chapter for additional support. She performs all the same duties as an RCS, but she only works with our chapter. Her title is Council Appoint Coordinator and her name is XX.*

If the chapter has an NCC: *Because we are a new chapter, we have a New Chapter Coordinator. She works with our chapter approving our calendar, BLSRs, overseeing all Honor Board proceedings and is a general resource for all things collegiate chapter related. Her name is XX.*

If the chapter has an RFS: *Each region also has a Regional Finance Specialist (RFS). Our RFS works closely with our vp: finance when making our budget, when removing women from our greekbill and Anchorbase roster and any other finance related issues that may arise in the chapter.*

If the chapter has a NCFC: *Because we are a new chapter, we have a New Chapter Finance Coordinator. She works with all new chapters, across the country, and supports us by helping establish our budget, keeping greekbill up to date and being a resource for us for all things finance. She works closely with our vp: finance.*

If the chapter has an RCRS: *Our Regional Collegiate Recruitment Specialist (RCRS) works closely with our vp: membership and EVC. She approves all things recruitment, such as RPWs and COB events, and supports us while we use MyVote.*

If the chapter has a CRC: *Each region has a Regional Collegiate Recruitment Specialist (RCRS) that works closely with all chapters in the region. Our chapter though has a Collegiate Recruitment Consultant that works only with our chapter on all things recruitment. She works closely with our vp: membership and our EVC to ensure that our recruitment is as successful as possible.*

If the chapter has a NCRC: *Because we are a new chapter, we have a New Chapter Recruitment Coordinator. This volunteer only works with our chapter. She supports our vp: membership and EVC to ensure that we have the most successful recruitments as possible.*

*We also work with a volunteer who oversees all housing in our region, our Regional Housing Specialist (RHS). Our House Corporation works the closest with this volunteer.*

*Lastly, there is a volunteer that oversees our Foundation efforts, and her title is Regional Foundation Coordinator or RFNC. Our RFNC works closely with vp: Foundation approving all fundraising and service events, as well as ensuring that all money fundraised is properly reported and sent to the Delta Gamma Foundation.*

#### Testing Knowledge

Total Time: 15-20 minutes

*Now, we are going to test our knowledge of Delta Gamma's structure and the support that is offered to us*

*through our advisers and regional team.*

Continue through the PowerPoint which has an interactive “test” that will help reinforce some of the things learned in the past session. Notes are located in the PowerPoint.

After you have completed the “test”, allow for a 5-10-minute break, before proceeding to Part III. If you are hosting lunch, or giving a break for lunch during this workshop, it would be appropriate to break for lunch between Parts II and III.

## Part III: Goal Setting

Total Time: 2.5 – 3 hours

### Room Setup/Supplies:

- Copy of Fraternity Standards (full version), Article II, and any recent CDC Reports for each officer.
  - A copy of the Fraternity Standards and Article II can be found in Appendix A. Past CDC Reports will need to come from the past chapter president, ATC or Executive Offices.
  - Optional: A copy of the chapter's most recent Article II Assessment may also be provided. Officers will either have this or need to obtain it from previous CMT.
- Flip Chart or Large Dry Erase Board
- Markers

### Learning Objectives:

- Evaluate their chapter using tools such as the Fraternity Standards, Article II and past reports.
- Create a SOAR analysis as it pertains to the current state of their chapter.
- Create at least one SMART goal, per officer.

### Evaluating your Chapter

Total Time: 30-45 minutes

Pass out copies of the Fraternity Standards, Article II, and recent CDC Reports to each officer/director in attendance.

Special Instruction: If you would like to include the chapter's most recent Article II Assessment worksheets, pass them out at this time. If you are using the Article II Assessment, include it in the below activity with Article II.

*In front of you are a few tools we can use to evaluate our chapter. The first is the Fraternity Standards. The Fraternity Standards are the 12 areas of chapter operations that each chapter must meet to be operating at Delta Gamma's expectations. Please read through these standards and as you read, underline what you believe our chapter does well, and circle anything that you think we can begin to do/improve upon.*

Allow women about 10 minutes to complete the activity, then move on.

*Next, we have Article II. Article II is the second article in Delta Gamma's Constitution, and it is the purpose by which each Delta Gamma, and Delta Gamma chapter, should strive to live. Please review Article II and list out two to three things that we do as a chapter that is an example of us living out Article II.*

Special Instructions: If you are using the Article II Assessment say, *as a chapter we completed the Article II Assessment. Also take this time to read through these notes and identify the top three things that you think are the most important for us to focus on as a chapter.*

Allow women 5 minutes to complete this activity, then move on.

*Lastly, we have the most recent Collegiate Development Consultant reports that evaluate our chapter based on the Fraternity Standards and Article II. Read through the report and highlight what you are proud of and circle anything that you think should be a priority for our chapter to do in the next year.*

Allow women 10 minutes to read through everything and complete the activity.

Now that you all have identified what you think our chapter does well, and where you think we can improve, please partner up and share with your partner. While you are sharing, write out examples that support your evaluation. For example, if you think we are strong in academics, then given an example of why you think this is true, or if you think we can improve our sisterhood, provide examples where you have seen our sisterhood fall short.

### SOAR Analysis

Total Time: 30-45 minutes

*To organize all the information that you just discussed, we are going to collectively do a SOAR analysis: Strengths, Opportunities, Aspirations, Results. We are going to start with our strengths and our opportunities. Strengths are things that we are currently doing well as a chapter, these are the items that you were asked to underline or write after reviewing our evaluation tools. Opportunities are things that our chapter can improve upon, these are the items that you circled or wrote out after reviewing our evaluation tools. Who would like to get us started?*

Begin to collect strengths and opportunities from partners. Write down these strengths and opportunities on the flip chart/dry erase board. Make sure that strengths and opportunities are written on different sheets of paper, or in different columns, so that the information is organized. Once the strengths and opportunities are identified make sure that the group reviews and agrees on everything that is written.

*Now that we have identified our strengths and opportunities, let's move on to the "A" and "R" section of our SOAR Analysis. Aspirations are what we want our chapter to be and Results are tangible, measurable items that will help us know when our aspirations/goals have been achieved. As a group, let's look at our evaluation tools, and keeping in mind our strengths and opportunities, let's name aspirations we have for our chapter and the results that we expect to come from achieving those aspirations.*

Encourage women to "think big" and name aspirations for the chapter. Ensure that for each aspiration there is a result that accompanies it. For example, if the aspiration is to raise more money at Anchor Splash, the result (money raised) can be compared from year to year. Once this is complete, move on to the next section.

Special Instructions: If you would like to complete Step 3 of the Article II Assessment in addition to the SMART Goals and Action Planning section of this workshop, you may at this point. You may also combine the two activities, as they are similar in nature. However, the goal of this workshop is to have specific goals related to each officer/director team so this should still be completed.

### SMART Goals

Total Time: 45 minutes – 1 hour

*Taking what we have done, we are now going to make SMART Goals as a CMT. We will be establishing at least one goal for each officer's team in our chapter, so at the end we will have at least nine goals. As a reminder, a SMART goal is:*

- *Specific*
- *Measurable*
- *Attainable*
- *Realistic*
- *Timely*

Proceed with creating at least one goal per officer team, asking yourselves along the way if the goal is specific, measurable, attainable, realistic, and timely. Once everyone has agreed on each goal, pass out a few bank pieces of paper to each officer/director team.

#### Action Planning

Time: 20-30 minutes

Special Instruction: For timing sake, you can wait to do this activity at the first JCMT meeting of the year. This may also help promote reflection time. However, it is an expectation that this section is completed either during this workshop, or at the very first JCMT meeting.

*Now, within your officer & director teams, we are going to create an action plan. Come up with two or three actions that you as a team, or as an individual, can take to ensure that the goal is met. Write down the goal and then write down your steps on the paper passed out to you.*

If goals were established that involve everyone on CMT, or a couple of different teams, then wait until individual teams are finished to establish action plans for those goals as a group. The facilitator should write the goal and the action steps on these sheets of paper.

At the end of this section, take pictures the SOAR analysis, and the goals with the action plan steps to share with the group via email, text, GroupMe message, etc. so that everyone has a copy. Let participants know that you will be doing this.

If you feel that your participants need a break, this would be an appropriate time to allow for a 5-10 minute break. Once the break is over, proceed to Part IV.



## Part IV: Skill Development

Total Time: 40-60 minutes

### Room Setup/Supplies:

- If you are facilitating the “Skill: Organization” section, ensure that you have enough printed out versions of Appendix B

### Learning Objectives:

- Identify four things they can start to do to be more organized.  
OR
- Define the four stages of team development.  
OR
- Describe the five steps to giving a successful presentation.

Special Instructions: Choose two of the following sections that is most applicable to what you believe your officers need in terms of skill development. If you would like to do the third activity at a JCMT meeting, that is perfectly appropriate.

*Our next section will focus on an area of skill development that is important for us, as chapter officers, to talk about and practice. I encourage you to take notes on a laptop or in a notebook during this section, as there will be actionable items you can take away from these conversations.*

### Skill: Organization

Total Time: 20-30 minutes

*The ONE Thing is a bestselling book and the namesake of a company that promotes the idea of narrowing focus and accomplishing more, by doing less. Besides the book, the company also provides podcasts, blog posts, and other tools that help individuals find ways to be the most productive that they can possibly be. Their blog post and podcast titled “How to Get Organized at Work” goes over the four areas of our lives that we need to get organized and gives us tips on how to organize those areas of our life.*

At this time, pass out the copies of Appendix B.

*There are four areas in which we can organize ourselves: our brain, our time, our workspace, and our projects. Now let’s read through the ideas under each theme to see how we can best organize our entire self.*

Ask for volunteers to read each point and the material that is with it. After each point is read, ask the following questions and discuss the answers:

1. *Which of these steps are you already doing? Are you doing it well? If yes, how?*
2. *Which of these steps do you think you struggle with the most? Why? How can you overcome that struggle?*
3. *Which of these steps are you not doing, but you want to start doing immediately? Why?*

### Skill: Team Development

Total Time: 20-30 minutes

Today has been centered around working within our JCMT as a team. In 1963, Bruce Tuckman created a model with four stages to group/team development. This model is still widely used today to discuss the stages of development a team encounters. These stages are:

- *Forming – The forming stage is the introductory stage. It is how the members of the team meet and become acquainted. Can someone give examples of how this JCMT has already engaged in the forming stage?*

Ask for two or three examples. If not said, mention the ice breakers/team builders at the beginning of the workshop, any team meeting to date or any other outing the team has done.

- *Storming – The storming stage is when conflict of some kind arises in the group. Conflict will occur and the way the team handles the storming within their development is very telling of how they will reach the norming and performing stages. We will revisit this stage later.*
- *Norming – The norming stage is when behaviors of the group come together, and the group becomes “synced”. What do you think our team will look like when we reached the norming stage?*

Ask for four or five examples. Behaviors can include, open communication, personal accountability, support of one another, etc.

- *Performing – The performing stage is when the group begins to reach its goals.*

*These stages are not linear, the team could at one moment be performing, and then storming could happening, the group works through it, and then makes it back through norming and then to performing again. For some reason, an officer or director may change, and we could go from norming back to forming. The developmental stages adjust to our dynamic but are important to know. The storming stage could cause disruption the most in our team. Let’s explore what this can look like in team:*

Read the following case study and then ask the following questions:

*Anna, Eva, Mary, and George have been assigned to work as a group throughout the semester. The first few weeks of the semester they spend time getting to know each other and discussing the assignment. Anna has assumed the role as the leader, assigning certain parts to the other three group members. Eva is the most creative and assumes the role of being responsible for the aesthetic elements of the presentation, Mary is very organized and has done most of the research, while George has filled in where he is needed. Their final project, a 20-page paper and presentation to go with it, is due in two weeks. So far, their research is complete, but no outline for the paper or the presentation has been created. Mary and George are both varsity athletes and cannot meet on most weeknights or weekends, except Sunday, because of practices. Anna is the president of her sorority and cannot meet on Sunday because of her chapter meetings. Eva is difficult to get in touch with because, as a fine arts major, she is usually in a studio on one side of campus completing a project for her major. Two weeks before the paper and presentation are due, Anna sends a frantic text message to the rest of the group about how behind they are. She demands they meet that night. George texts back and states he cannot meet until after 8 p.m. as he has practice and then he needs to eat dinner. Eva texts and states that she has another project due and cannot meet at all. Later that night, Mary and George are walking from the dining hall to the library to meet with Anna, and as they walk they complain about Anna’s lack of leadership. Their attitudes are poor when they walk into the library,*

*and not a lot of work gets completed that night.*

*How many of you have been in this kind of situation with a group?*

Allow for women to raise their hands.

*For those of you with your hand raised, how did that situation you are thinking about turn out?*

Ask for three or four examples.

*As we listened to those stories, what are some of the things we heard that caused issues with the group?*

Ask for people to name a list of issues such as poor communication, lack of commitment, lack of leadership, etc.

*What do you think Anna, Eva, Mary, and George should do to go from the storming stage to the norming stage?*

Allow for this discussion to go at length. Ask for women to identify simple things that can be done to move out of a storming stage to a norming or performing stage. Examples should include: establish group rules, follow those ground rules and hold yourself and others accountable, communicate, ask for help, play to each other's strengths, always be respectful and polite, etc. At the end of the discussion proceed:

*Thank you again for participating in our discussion. As we move forward as a team, I think it is important that we understand these four stages and recognize how we can move through the storming stage, to not stunt our development as a team.*

#### Skill: Presentation Skills

Total Time: 20-30 minutes

Special Instructions: It is recommended that if this section is used, it is facilitated by someone who is considered a strong presenter.

*As a new officer, you are going to be representing our chapter on all different types of stages, whether it is within our chapter, within our community, or to other communities at the university. As you represent our chapter, it is important that you remember that everything can be a "presentation". Even if there is not a slideshow or notecards that you prepare, when we are trying to influence others, we are presenting something. Therefore, we are going to talk about five ways to conduct a successful presentation, with the acronym POINT:*

*First, you need to prepare. Can you offer up how you prepare for a formal presentation?*

Allow for five or six suggestions to be given.

*How do you think you can prepare for a non-formal presentation? Such as a meeting? Or a discussion with a chapter member/adviser/community member? Remember, presentations are given anytime we are trying to give information and/or influence someone, so they can be given at any time.*

Allow for five or six suggestions. Listen for tips such as: take deep breaths before entering a meeting, make

notes of the high points you want to make during the conversation, ensure that you meet those points, etc.

*The next step is to Outline Intent. To begin your presentation, you should always outline the intent of the presentation, may it be, to give information, ask for a discussion, or try and influence the audience to your opinion of something. Examples of this are: "After this presentation, you will be fully aware of your financial responsibilities to the chapter", "I want to discuss the chapter programming and how we can improve it" or "I believe that Honor Board is a great place to share your feelings about the chapter, good and bad, I am going to tell you why". This lets your audience know what you will be presenting, asking, or informing them about.*

*The next step is to Involve Audience. How do you think you can involve the audience during a formal and non-formal presentation?*

Allow for five or six suggestions. Listen for tips such as: ask questions and require answers, facilitate a discussion, start with a story, make it personal, etc.

*Next, the step is to Narrow Focus of the presentation. If your audience needs to come away with one to three major things, what are they? Understand that before you present and ensure that when you summarize at the end of your presentation, you tell them the one to three things they should remember.*

*Lastly, you need to Tailor your presentation. Reflect on what you have compiled. Make sure it will be engaging for your entire audience and ensure the information is correct and concise. How do you think you can tailor a non-formal presentation?*

Allow for five or six suggestions. Listen for tips such as: adapt to the audience, ask clarifying questions to ensure your audience understands what you are trying to say, prepare with a few different ways to approach the subject, etc.

*Remember, Prepare, Outline Intent, Involve Audience, Narrow Focus and Tailor as your POINTs to make during a presentation and you will be successful.*

## Part V: Leadership Development

Total Time: 15 minutes

Room Setup/Supplies:

- It would be preferred that you have AV available and are able to setup a projector to show a video. If AV is not available, please play the video on your computer and ask women to gather around to watch it. Ensure that you have good enough sound for everyone to hear.
- The link to the video is: <https://www.youtube.com/watch?v=vlpKyLkIDDY> Play the video from the 7:04 minute mark until the end of the video.

Learning Objectives:

- Identify the three strategies to enhance self-leadership
- Create a commitment statement to themselves and the chapter

*Thank you so much for participating today. We are now going to do our last activity to end on a high note and to give you something to think about. To start, we are going to watch a short video of Lars Sudmann. According to his bio, Lars is a leadership advisor and award-winning lecturer. During this talk at a TEDx event centered around what a “utopian society” would look like, Lars talks about the challenges that leaders face. He states that these challenges are: too little time, people and, power. However, Lars gives a solution for managing these challenges. Let’s listen to a portion of Lars’ talk titled, “Great Leadership starts with Self-Leadership”.*

Play Lars Sudmann’s talk from the 7:04 minute marker until the end of the video. Ask the below questions after the video is done and allow for a brief, 3 – 5-minute, discussion:

*What are your thoughts about what Lars had to say about leadership and the importance of self-leadership?*

*Do you think you could incorporate his three strategies into your routine?*

*How could you see these three strategies assisting you in being a better leader?*

After you have discussed the questions above, please proceed:

*Thank you, again, for your participation today and for saying “yes” to be a leader in our chapter. Before we leave, I ask that you pull out a blank piece of paper. On this piece of paper, please write a commitment statement. It should start, “I NAME, commit to...” Write down one thing you will do throughout your term as an officer that will help better our chapter. Remember, be specific and ensure that it is attainable and realistic.*

Allow everyone a few minutes to write their statement.




*Take this statement with you. Place it in your binder, an agenda, on your mirror in your room. Put it somewhere that you will see it and you can be reminded of your commitment to yourself and to our chapter. We will end our workshop with the Oath of Friendship.*

# Appendix A - Delta Gamma's Fraternity Standards and Article II

Delta Gamma Fraternity Standards for Collegiate Chapters ([See full version here](#))



## FRATERNITY STANDARDS FOR COLLEGIATE CHAPTERS

 <p>Demonstrating an understanding of and respect for Delta Gamma's larger purpose and values.</p>	 <p>Championing authentic sisterhood that challenges women to become better versions of themselves.</p>	 <p>Fostering chapter morale, enforcing policies and procedures and upholding Delta Gamma values through a functioning Honor Board.</p>	 <p>Fostering positive and collaborative relationships with their campus, community, alumnae and the larger Fraternity.</p>
 <p>Welcoming new members into our Fraternity utilizing values-based recruitment and adhering to all membership related policies and procedures.</p>	 <p>Encouraging members to achieve their potential through participation in leadership and personal development opportunities.</p>	 <p>Cultivating an environment that encourages and expects academic achievement.</p>	 <p>Supporting the Delta Gamma Foundation and engaging in service to others in the spirit of "Doing Good."</p>
 <p>Honoring all fiscal-related responsibilities to be in financial good standing.</p>	 <p>Executing all necessary operations to have a successfully functioning chapter.</p>	 <p>Fulfilling all required programming expectations in a thoughtful and intentional way.</p>	 <p>Empowering members to make informed decisions in high-risk situations based on our purpose and organizational values, while promoting risk management and personal safety.</p>

**Article II of Delta Gamma's  
Fraternity Constitution States:**

The objects of this fraternity shall be to foster high ideals of *friendship* among women, to promote their *educational and cultural interests*, to create in them a true sense of *social responsibility* and to develop in them the best qualities of *character*.

## Appendix B - How to Get Organized at Work (from *The ONE Thing*)

The below list is to be used in Part IV under the "Organization" section. If you have chosen to facilitate this section, print out enough of these lists for all members participating.

### How to Get Organized at Work

#### Organize Your Brain

**Get Enough Sleep** – Sleep deprivation does a number on our grey matter. Anyone who has experienced a restless night can tell you that mental acuity diminishes with every hour of sleep we lose. Aim to get around seven hours of sleep each night and consider working in power naps during the afternoon to reenergize at the end of the workday.

**Make an Effort Not to Multitask** – Going back and forth between various tasks does nothing but slow our brains down and cloud our judgment. Trying to do two or more things at once can even release the stress hormone cortisol in the brain, which can impact your ability to concentrate and make decisions.

**Take Breaks** – David Levitin, a neuroscientist and author of *The Organized Mind*, suggests that people should [take breaks at work](#) to allow the brain to daydream. It's during these periods that our brains are most creative and it helps give us a productivity boost.

#### Organize Your Time

**Start with Goals** – When organizing your time, the first thing you should do is identify your goals. Goals help us focus our energy and serve as a starting point for identifying what we need to get done. Download our free [Long-term Goal Worksheet](#) to help pinpoint your top goals for the next year and beyond.

**Outline Your Priority** – Once goals are identified, your priority will become clear. Your priority is the most important task that you need to complete in order to accomplish your most important goal and move things forward.

**Time Block Each Day** – A lot of emphasis gets put on time blocking in *The ONE Thing* because it works. The concept is simple – create a schedule for each day squaring away time for every task you need to complete. This creates deadlines and puts time limits to tasks, making it an automatic time organizer.

**Have Everything You Need Within Reach** – Take a careful inventory of everything you use on a regular basis to get things done at the office. Keeping these items at your desk or on your computer will maximize productivity and make organization easier.

**Get Rid of the Non-Essentials** – Clutter is a distraction. We're not saying that your desk needs to be a fun-free zone, but cutting out non-essentials will make a workspace more functional and productive. If you haven't used something in the past six months, get rid of it or store it away somewhere off your desk and out of eyesight.

**Put Paperwork in Its Place** – Piles of paperwork are one of the biggest organization pitfalls. Instead of letting paperwork stack up, create a filing system that is based on the one-touch method. Make



different files for each project or client, and when a document comes across your desk either act on it, trash it or file it away. Once the project is complete go back through the file and get rid of anything that isn't essential.

### Organize your Virtual Workspace

Your e-mail is its own workstation. Organize it the same way you would organize your paperwork – files and a one-touch system. Apply the filing system to your electronic files as well. Another strategy to consider is [to develop a time block](#) for checking your e-mail only two or three times a day so it doesn't become a time-sucking distraction.

### Organize Your Projects

Keep Current Projects Front and Center – Having all of your current projects out in the forefront can help you stay focused on the tasks that matter most right now.

Map Out Milestones – When you are handed a project one of your first tasks should be working backward from your desired end point to create milestones. Like [high-level time blocking](#), this will help provide you with vision and a sense of priority in the short and long term.

Source: <https://www.the1thing.com/productivity/how-to-get-organized-at-work/>

## **Appendix C - Forms**

Forms related to Slating, Elections and Transitions are available on Anchorbase to send to members. If needed, the printed versions on the following pages may be used.

## Chapter Officer Interest Form

Name:

Email address:

Cell phone number:

Year in school:

Major(s):

Minor(s):

(If applicable) current chapter office:

Previous and current chapter activities:

Previous and current campus/community activities:

Awards and honors:

I am currently employed:    yes    no

(If yes to question above) I work \_\_\_\_\_ number of hours per week.

(If applicable) I will be living in the chapter house next year, so I would like to be considered for a live-in position:    yes    no

I would use the following three words to describe myself in a team setting:

- 1.
- 2.
- 3.

An example of a time I was a part of a successful team is:

I would use the following three words to describe myself as a leader:

- 1.
- 2.

3.

An example of a time when I had to be a leader is:

<p>I see the following areas of our chapter as successful:</p>	<p>I have the following skills that will contribute to the continued success of our chapter:</p>
<p><i>Example: Our chapter has a great system of communication and women are well informed of what is going on within the chapter.</i></p>	<p><i>Example: I am an excellent communicator, and I believe it is important to communicate our progress and current projects with members of the chapter.</i></p>

<p>I see the following areas of our chapter in need of improvement:</p>	<p>I have the following skills that will help our chapter improve these conditions:</p>
<p><i>Example: Members of our chapter feel as though their voices are not heard.</i></p>	<p><i>Example: I am an excellent listener, and I believe in showing women how their voices are being heard through actions put into place by officers.</i></p>

I am interested in the following positions (up to five positions):	I would like to be considered for this position/I am qualified for this position because:	Ideas and goals I have for this position include:

I would like to be considered for a position on Honor Board:    yes    no

(If yes to question above) I would like to be considered for this position/I am qualified for this position because:

(If yes to question above) Ideas and goals I have for this position include:

Personal statement: please write a 2-3 sentence statement expressing why you are interested in holding a position and why you feel you should be considered (to be included in the Recommended Slate):

I am willing to have my name submitted for the offices I have listed and understand the duties of each.

Signed:







Signature: \_\_\_\_\_  
\_\_\_\_\_

## **Appendix D - Slating, Elections and Transitions (SET) Accommodations for New Chapters**

### **THE NOMINATING COMMITTEE**

The Nominating Committee is a standing committee of every chapter. In new chapters, the Nominating Committee is composed of the advisory team chairman (ATC), a stationed Collegiate Development Consultant (CDC) and five or seven chapter members elected at-large, with committee size determined by the ATC and CDC depending on chapter size. The ATC votes in the event of a tie. The CDC is a non-voting member.

All members must be in good standing to serve. No other members may be added to this committee. The responsibility of the Nominating Committee is to form the chapter slate based on input from the chapter members' Officer Interest Forms and Recommended Slate forms.

#### **NOMINATING COMMITTEE ELECTION PROCESS (SET STEP 4)**

1. The CDC will announce the date of elections for Nominating Committee at the chapter meeting prior to the stated date. She will also give a presentation on the purpose of Nominating Committee.
2. Members who are interested in running for the committee may submit their name to the CDC until 48 hours prior to the election.
3. The CDC will create a ballot listing all interested members in good standing. Members will be listed in alphabetical order by last name.
4. During the next chapter meeting, the CDC will distribute the ballot to chapter members who are eligible to vote.
5. Members will vote for up to five or seven members who they want to serve, depending on committee size. The committee will be populated with the five or seven members who receive the most votes.
6. In the event of a tie for the final slot, members will revote on the two tied members prior to the announcement of the full committee.

For new chapters during their first election cycle, the members of the Nominating Committee will elect a chair during a meeting of the committee called for that purpose. A stationed CDC will attend all Nominating Committee meetings to ensure that members of the committee understand and fulfill their responsibilities and that the chapter understands the election process. They will also be responsible for ensuring that all materials, necessary election forms and ballots are

prepared and distributed. The CDC must inform the advisory team chairman of the dates of the Nominating Committee slating meeting, director appointment meeting and the formal transition workshop.

## **SLATING**

### **THE NOMINATING COMMITTEE MEMBER RESPONSIBILITIES**

The Nominating Committee, ATC and CDC meet to consider all member-submitted Officer Interest Forms and Recommended Slates in order to formulate a final slate. The slate is developed after the advisory team chairman verifies the good standing of each candidate.

### **Suggested Nominating Committee member responsibilities:**

#### **Committee Chair**

- Chairs the meeting
- Reminds the committee that all discussions must be kept confidential
- Provides each committee member with a list of each office and every member who has indicated an interest in that office
- Keeps order
- Counts votes

*Three separate committee members should be assigned the following tasks:*

- Reads the Officer Interest Report
- Reads the results of the Recommended Slate forms
- Counts votes (along with ATC) if president is a candidate for office

#### **ATC**

- Serves as an observer
- Clarifies questions/procedures
- Votes in the event of a tie
- Counts and records votes
- Destroys all record of discussion, voting, slates and evaluation
- Approves the final slate created by the Nominating Committee

#### **CDC**

- Serves as an observer
- Clarifies questions/procedures
- Ensures access to Officer Interest Report and results of the

Recommended Slate forms for committee members