



Officer Onboarding Workshop

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Learning Objectives

Participants will...

- Learn insights from outgoing officers and local advisers regarding the work they accomplished during their term.
- Navigate the early stages of team development through a series of team building activities.
- Log into and practice utilizing the Delta Gamma Library.
- Identify the functional training resources available to them through The Pursuit.
- Evaluate the chapter using the Fraternity Standards for Collegiate Chapters.
- Ideate on the chapter's potential and aspirations for the upcoming officer term.
- Draft team-specific SMART goals and identify action steps to accomplish these goals.

Preparing for the Workshop

The incoming chapter president is expected to facilitate this workshop with support from their advisory team chairman.

Before the workshop, you should:

- Thoroughly read this guide and familiarize yourself with the material.
- Gather all supplies for the workshop, including flip charts, markers, and supplies for team building activities.
- Set a date and time for the retreat and ensure all attendees are invited. Attendees should include all incoming CMT/JCMT officers. Consider inviting local advisers to attend and assist with facilitating. Outgoing officers to participate in Part IV should also be identified and invited ahead of time. In total, the length of the workshop will be roughly 4 hours, so schedule accordingly!
- If desired, you may use a PowerPoint slide deck projected on a large screen in place of flip chart paper for note-taking activities like the SOAR analysis or communication expectations.

Pre-Work

One-on-One Meetings

This section should be completed prior to the workshop.

Prior to these meetings, the outgoing officer should complete the following:

- Complete the first part of the Offboarding Course assigned to them in the [Pursuit](#)
- Complete and submit the [Offboarding Worksheet](#)

Incoming and outgoing CMT/JCMT should pair with their counterpart (e.g. outgoing vp: programming pairs with incoming vp: programming) to complete Part 2 of the Offboarding course inside of the Pursuit. The Pursuit course will prompt a conversation together. Encourage pairs to also discuss:

- What are you most proud of accomplishing during your term?
- What do you wish you had more time to accomplish?
- What does the incoming officer need to know during the first 30 days?

Each incoming officer will be asked to share two takeaways from their conference with the group at the start of the officer onboarding workshop.

Introduction

At the start of the retreat, the president should welcome everyone to the workshop and share the agenda for their time together. It's recommended that everyone introduces themselves and their role, particularly for the benefit of any advisers in attendance who may not know all officers yet. As members introduce themselves, they should share takeaways from their transition meetings with their outgoing officer counterpart as outlined in the Pre-Work section above.

This introduction allows the facilitator to set the tone for the workshop. While it is a lengthy meeting, the learning objectives at the start of this guide outline the many reasons why this workshop is important. A positive, upbeat and engaged facilitator will provide space for attendees to display the same behaviors.

Part I: Team Building

This section includes both “get to know you” activities and team building activities. Pick at least one get to know you and one team building activity from this list to complete as a group. This section will take 60-90 minutes.

Treasure Box – 45 minutes

**Get To Know You Activity*

Supplies: Timer (if needed)

In this activity, officers will have the opportunity to share about their values, passions, and interests while reflecting on experiences that got them to where they are today.

NOTE: If possible, members should be made aware of this opportunity beforehand so they may bring their physical items to the workshop.

Each officer selects 3-5 items that represent them, their leadership journey, what is most important to them, what qualities they bring to the table, etc. These items should be small enough to fit in a shoebox. Encourage members to get creative! Puns, abstractions, and any other strategies to get their point across considering size/time limitations are welcome and encouraged.

Examples might include:

- A photo of a loved one the member looks up to. They may share what they’ve learned from that relationship.
- Their Delta Gamma pin which represents how much they’ve grown as a result of their membership.
- A phone charger because they love to energize others!

The facilitator should be prepared to model the way by sharing their Treasure Box with the group (you may consider sharing yours prior to the workshop so officers have time to think about what they would like to include).

If needed, consider setting a timer for each officer to share – 3-4 minutes should be sufficient.

Ten Things in Common – 20-25 minutes

**Get To Know You Activity*

Supplies: Flip chart, markers

The purpose of this activity is to help members find common ground. When officers understand each other better, they are more likely to give each other the benefit of the doubt when something goes wrong.

Ask participants to split into groups of 3-4 (consider setting groups yourself to help officers split away from the members they know best). Task each group with identifying and writing down 10 things they all have in common with each other (they can list these on the flip chart). Groups should take 10-15 minutes to complete this before sharing out their list.

DEBRIEF

How easy or hard was it to identify commonalities in your group?

Why is it important to find common ground with your fellow officers?

Jet Fighter – 30-45 minutes

**Team Building*

Supplies: Index cards or similar size sheets of paper, pens, flip chart, copies of role instructions

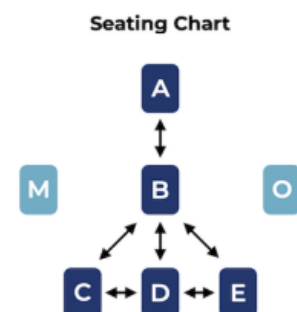
The purpose of this activity is to explore communication systems and the ways that messages are or are not delivered in a group.

SET UP

Divide participants into groups of 4-6. Depending on the number of participants, groups can have seven participants and an observer or remove a chair from the back row or share messengers as needed to accommodate the number of participants. If needed, the facilitator can serve as messenger.

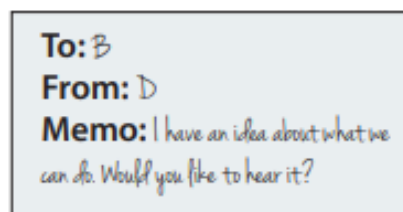
Arrange chairs in a “jet fighter” formation – one chair at the front, one chair behind front chair, and three chairs next to each other behind the middle chair (see image).

Participants can sit on the floor in this formation if needed. Omit O if there is not an observer. Place a stack of index cards and a writing utensil on each seat.



Prepare the following rules on a flip chart so they can be referenced throughout:

- Seating Chart with arrows (as indicated above).
 - A, B, C, D, and E are participants. M is the messenger. O is the observer (if applicable).
 - A can communicate with B (as represented by arrows).
 - B can communicate with A, C, D, and E.
 - C, D, and E can communicate with B and each other.
- All communication must be in written memo format (see example). You must use participants letters, not their names, in all communication. Messenger will pass memos between participants and verify that information is correctly formatted. Messages that are incorrectly formatted may be delayed or destroyed.



The facilitator assigns participants to their roles. It is recommended that the facilitator thinks strategically about where different participants might be most challenged – for example, placing a more reserved officer in the middle row so they are at the center of a lot of the communication.

INSTRUCTIONS

Give each role their instructions on a print-out. Tell participants that no questions will be answered about the instructions and there will be no speaking once instructions have been given.

NOTE: The instructions say that participants may not “show” their symbols to anyone. Participants may interpret this in different ways, adding to the challenge of the activity. Ultimately, everyone will need to find some way to communicate their symbols.

The instructions for each participant are as follows:

- Person A:
 - In this exercise, you are Person A. The reporting structure is as follows: B reports to you; C, D, and E report to B.
 - Each of you have been given five symbols, each of which is one of six familiar symbols. Your job is to find out which one of the six symbols is held in common. You must finish this job in 20 minutes. You may communicate with B only through the exchange of written notes. B may exchange notes with you and C, D, and E. Persons C, D, and E may exchange notes with B and with each other. No other communication is permitted.

- To elaborate:
 - There are six unique symbols.
 - Each person has five of these six possible symbols.
 - There are five symbols that appear four times each.
 - There is one symbol that appears five times.
 - You are to determine which one symbol all five people hold.
- Your symbols are as follows: $= \div \Sigma \& ?$
- Person B:
 - A & B may exchange notes.
 - C, D, and E may exchange notes with B and with each other.
 - No other communication is permitted.
 - You will find five symbols below. You may not show them to any other person.
 - Your symbols are as follows: $\Sigma \div = \& \Psi$
- Person C:
 - A & B may exchange notes.
 - C, D, and E may exchange notes with B and with each other.
 - No other communication is permitted.
 - You will find five symbols below. You may not show them to any other person.
 - Your symbols are as follows: $\Psi \div ? = \&$
- Person D:
 - A & B may exchange notes.
 - C, D, and E may exchange notes with B and with each other.
 - No other communication is permitted.
 - You will find five symbols below. You may not show them to any other person.
 - Your symbols are as follows: $\div ? \& \Psi \Sigma$
- Person E:
 - A & B may exchange notes.
 - C, D, and E may exchange notes with B and with each other.
 - No other communication is permitted.
 - You will find five symbols below. You may not show them to any other person.
 - Your symbols are as follows: $\Psi = \Sigma ? \div$
- Messenger:
 - Please move as quickly as you can.
 - You must correctly deliver all messages which are properly addressed although messages can be delayed. You are encouraged to delay messages to the extent that you wish.
 - Do not deliver messages that are not properly addressed.

- If you have questions, raise your hand.
- All communication must be in writing, in memo format:

TO: Person A

FROM: Person B

MEMO: Include message here.

- If a message is incorrectly addressed, either return it without saying anything, put it in your pocket, or throw it away. You can be dramatic or subtle. You do not have to tell them why you are returning it or throwing it away. The point here is that sometimes messages are given incorrectly, not addressed correctly, or given to the wrong person, with the result being that they don't get "delivered."
- Observer:
 - Watch what each of the other participants in your group does.
 - Take notes on what is taking place and how each participant is responding.

Once you have given each group their instructions, tell the whole group that they have 20 minutes to complete the activity. If they need more paper, they can request some from their messenger.

Stand back and watch what happens. Do not answer questions or engage with participants aside from assisting messengers if they raise their hand or providing additional supplies to participants.

NOTE: Person A will have all of the instructions and information. Person B-E will have very limited instructions. The messenger will have even less information, and the observer will have the least information about what is going on.

DEBRIEF

- What was challenging or frustrating about this activity?
- How was your group successful? What would have allowed your group to be more successful in this activity?
- Why is effective communication critical to the success of a group?
- How do communication channels and structures affect the flow of information in a group?
- What can we do to ensure information is communicated effectively?

Hot Buttons – 15 minutes

**Team Building Activity*

Supplies: Small slips of paper (enough for each participant to have three), writing utensils, a container for the slips of paper

Everyone has pet peeves or behaviors that push their buttons. When you are working in a close environment with others, it's important to understand what these triggers might be and recognize when something is pushing your buttons so you can find strategies to manage that frustration.

This activity doesn't promise that we will never push each other's buttons, but at least we can verbalize some of our common pet peeves and understand that we all have different approaches to our work and relationships. The goal of this activity is to get to know each other's working styles better in the hopes that we can prevent some conflicts from arising.

"Hot buttons" are phrases or behaviors that trigger an angry response, like a know-it-all attitude, being interrupted, or inattentive listening. They are unique and can vary from person to person. Each member should write down three "hot buttons" on separate slips of paper and drop them in a container. Once everyone has completed this, participants should take turns drawing slips of paper out of the container and reading them aloud. If a "hot button" is read that is also a pet peeve of yours, members are encouraged to raise their hand or give snaps.

DEBRIEF

- What surprised you about this activity?
- How do you respond when someone pushes one of your hot buttons? What do you need from yourself or others when you are irritated?
- How can we hold space for feelings of frustration in the group without letting it keep us from getting work done?
- Did you notice any hot buttons that you have pushed? What did that feel like?

Remember that it's perfectly normal to push others' buttons and have our buttons pushed sometimes. Hopefully, this activity helps you reflect on what might be challenging about working with a big group of people and help us be conscious of others' needs.

M&M Share – 15 minutes

**Get To Know You Activity*

Supplies: A large enough bag of M&Ms for each participant to take however many they would like.

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

We are now going to share about ourselves based on the color of M&Ms you drew:

- For every red colored M&M share a favorite memory of a birthday you have had.
- For every yellow colored M&M share a favorite movie or television show.
- For every orange colored M&M share a favorite food.
- For every brown colored M&M name someone famous you would like to hang out with.
- For every green colored M&M name a place you would like to travel to.
- For every blue colored M&M 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.

The Maze - 25 minutes

**Team Builder Activity*

Supplies: Masking tape

SET UP

Create a 10x10 grid on the floor using masking tape. Each square of the grid should be large enough for a person to stand in as they walk through the “maze.” The key for the maze is shown below:

						★			
					★				
				★	★				
			★						
				★					
				★					
			★	★					
		★							
		★							
			★						

INSTRUCTIONS

The grid represents a floating bridge over which the entire group must cross. Some of the boards float and others sink. There is a specific pattern you must follow in order to get to safety. One person will begin by stepping on a square. If it is correct, you will be allowed to take a second step.

If you step on an incorrect square, I will “buzz” you. If you are “buzzed” the entire group must start over and try again. The challenge is to get the full group across following the correct pattern as quickly as possible.

Additional rules are as follows:

- Only one person may be on the board at a time.
- Each person must cross the board successfully.
- When someone is on the board, nobody may talk or communicate in any other way.

DEBRIEF

- What worked well for the group? What didn't?
- What was frustrating about this activity?
- How did preparation, planning or trial/error come into play?
- What did it feel like if you messed up and the group had to start again? What did it feel like to watch someone mess up?
- When is it important to analyze and plan a strategy before beginning? When is it important to just give something a shot?

Part II: Functional Training

Using the Delta Gamma library – 20-30 minutes

There are many resources available to you throughout your term as an officer. Many of these are housed in the library, which houses a wide variety of documents about all things Delta Gamma. Today we are going to practice navigating the library and exploring the resources it has to offer.

First, let's log in:

- Navigate to www.deltagamma.org and click the "Login" button at the top of the page.
- Using your member site information, log in to the website.
 - If an officer does not know their login information, ask them to email DG-EO@deltagamma.org requesting that information. They will need to look at someone else's computer and/or have another officer email them downloaded versions of some of the resources.
- Once everyone is logged in, click on "library" at the top of the page.

Everyone should be on the home page for the library where you'll see the search bar across the top of the page as well as a sidebar with different types of resources (handbooks, toolkits, procedures, etc.) as well as resources for different subject areas.

The library is constantly being updated with new and updated resources. You may find that you reference the same resources frequently over the course of your term – to ensure you always have the most up-to-date version of the document, make sure you bookmark the landing page (where the document's name and a "download" button appears) for that document instead of downloading a copy or bookmarking the PDF itself. The landing page will never change, whereas the document itself could change once a week depending on the volume of edits or updates being made.

The search features in the library can be hit or miss – we find that using the exact terms for the resource you are looking for is the best way to get results, but sometimes that means trying a few different strategies to get to the document you're looking for. This activity is meant to help you get used to the library and learn more about the resources it has to offer.

Divide participants into groups of 2-3. Each team should have a device they can use to access the library. One by one, prompt the group to race to find the following information and "buzz in" for a point. Groups should identify the document and page number where they found the information.

Information may be found in multiple places, but we have identified at least one resource below where the information may be found in case teams are stumped.

- Find the Calendar Planning Guide
- Find our chapter's history document
 - Listed in the library under "Chapter Designation-Institution Chapter History" (ex. Alpha-Mount Union Chapter History)
- The process to add a new member's sponsorship in Anchorbase
 - Uploading Confirmation of Sponsorship to the Manage New Members Task
- A document that explains the collections process
 - Greekbill Collection Services
- Identify the Delta Gamma region we are in
 - Regional Maps
- The recruitment voting software user guide
 - Recruitment: MyVote Resources
- The process to add a member transferring from another Delta Gamma chapter to your chapter's Anchorbase roster
 - Anchorbase: How to Update your Roster
- The mental health programs and services offered by Delta Gamma
 - Anchored Through Adversity
- The document/letter which should be emailed to a former member in financial arrears before submitting their account to collections
 - Past Due Account Notice
- Information about the Panhellenic judicial process
 - Anchored in Panhellenic Resource Guide

Communication Expectations – 20-30 minutes

Supplies: Flip chart, markers

Communication is an important aspect of being an officer. Communication takes place between officers and many stakeholders: Executive Offices, the regional team, other chapters or administrators on campus, with chapter members at large and with fellow officers! We'll use this time to review and set expectations with these groups.

As participants share feedback or ideas around these communication expectations - particularly the group's agreed-upon expectations for communicating with each other and with the chapter - someone should take notes on flip chart to share out with the group later.

Executive Offices

- Delta Gamma Executive Offices are open Monday-Friday from 8 a.m. to 5 p.m. ET.
- EO staff primarily communicate with chapters via email or occasionally by phone. Staff utilize the contact information listed under your officer role in Anchorbase. Please confirm that this is an email and/or phone number you have access to and check often!
- If you cannot find the contact information for a specific staff member at Executive Offices, reach out to DG-EO@deltagamma.org or (614) 481-8169.
- Officers should respond to communication from EO within 48 hours.

Regional team

- The regional team is comprised of volunteers who may not have set working hours for Delta Gamma tasks.
- Work with the regional team members your role collaborates with to establish preferred communication styles (phone, email, text, etc.).
- Officers should respond to communication from the regional team within 48 hours.

Advisory team

- Like the regional team, your chapter's advisers are volunteers who may not have set working hours for Delta Gamma tasks. Work with your advisory team counterpart to establish preferred communication styles and response time expectations.

CMT/JCMT

- What is the expected turnaround for response times to communication from fellow officers?
- How do we expect to be treated and to treat each other during CMT/JCMT meetings?
- When are our planned meetings for this term?

General Chapter Members

- What is the expected turnaround for response times to communication from general chapter members?
- How should we deliver information to chapter members? What sort of attitude do we want to present to them (either in person or via electronic communication)?
- How often are reminders required about announcements? How are announcements delivered?

These questions can serve as a jumping-off point to guide this conversation and set expectations for communication as a group.

Part III: Goal Setting

This section is segmented into three distinct aspects: chapter goal setting (evaluating the chapter & SOAR analysis), team goal setting within VP groups (SMART goals) and individual goal setting (action planning). This section is structured intentionally to help each officer to see their role in the larger success and progress of the chapter. If needed, this section can be completed during the first CMT/JCMT meeting of the term - but don't forget to skip Part IV and the wrap-up!

Evaluating the Chapter – 30 minutes

Supplies: Access to Fraternity Standards (full version), any recent CDC reports, the chapter's most recent Article II Alignment/Anchoring Team visit report (if applicable), the chapter's status action plan (if applicable), writing utensils (pens, highlighters, etc.)

Allow members 10-20 minutes to review the supplied documents (Fraternity Standards, Fraternity visit reports, action plan, etc.). Highlight anything you are proud of and circle anything that you think should be a priority for our chapter to accomplish in the next year. Members can then partner up and share what they have identified. Be sure to note any examples that support your evaluation. For example, if you think we are strong in academics, give 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 – 30-45 minutes

Supplies: Flip chart, markers

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.

SMART Goals – 45 minutes

Participants should group up with their officer teams to create at least 2-3 SMART goals. As a reminder, a SMART goal is:

- Specific
- Measurable
- Attainable
- Realistic
- Timely

After drafting, each officer team should share out at least one SMART goal. Other participants may share feedback and ask questions as needed to refine the goals. Some goals may involve multiple officers. After each officer team has created and shared their goal(s), the large group can propose additional goals that might require collaboration across officer teams. Follow the same process of gathering feedback and refining the goals.

Once finalized, all CMT officers should submit their goals. Goals can be updated throughout their officer term. [Click here to submit](#) officer goals.

Action Planning – 20-30 minutes

Supplies: paper, writing utensils

Now officers are going to create an individual action plan on how each officer will contribute to their officer teams. The purpose of the action plan is to identify steps you can take to ensure the goals you drafted in our last activity are met. Come up with 2-3 actions that you as an individual officer can take to meet your chapter's and team's goals. Officer teams should share their individual action plan with each other after individual reflection is complete.

If goals were established that involve multiple officers, wait until the other individuals involved are finished to establish action plans for those goals as a group. The facilitator should take notes on the goal and action steps on another sheet of paper.

Once individual goal setting is finished, officer groups should share together and be prepared to share highlights with the entire group if time allows.

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

Part IV: Outgoing Officer Insights

Panel - 30 minutes

This is an opportunity for incoming officers to ask questions to outgoing officers (and advisers if desired) as a large group. Consider discussing topics such as:

- Boundaries/time management
- Planning & leading an effective meeting
- Effective communication & presentation skills
- Collaboration (how to work with people with different ideas or points of view)
- Leading with integrity
- Leading peers
- Building strong relationships with advisers

Each chapter should customize this section to best fit their needs. A few ideas for how to execute this section include:

- A panel of officers discuss these topics and questions with the entire group.
- Outgoing officers host roundtable-style discussions with each officer discussing one of the topics above. Participants may rotate around to different tables to hear from the officers.
- At the discretion of the facilitator, local advisers may also be invited to share their experiences and/or professional knowledge as it relates to the organization, team development, presentation skills, etc.

Wrap-Up & Closing

Reflection Web - 10 minutes

Supplies: ball of yarn/string

The purpose of this activity is to reflect on what we have learned both about our officer roles and about each other.

With members sitting or standing in a circle, hang onto the end of the string and toss the ball to someone else in the group. State something you appreciate about that person or something you are taking away from the workshop. The receiving person does the same until everyone in the group has received the string, forming a web across the entire circle.

Closing Remarks - 5 minutes

The facilitator should thank the attendees for engaging in this workshop and giving their attention and energy for the full time. Allow any advisers to share closing remarks if desired. This concludes the Officer Onboarding Workshop!

After closing out the meeting, don't forget to take pictures of any notes on the flip charts to share out with attendees.