



Theta Delta Chi International Fraternity

Transition Manual Guidelines

Components of an Effective Transition Manual:

1. Position Title
2. Current Position Holder and contact information
3. Description of Position in Bylaws
4. Useful Insights
5. Important Contacts for your position
6. Monthly Schedule

The Purpose of a Transition Manual

The officer transition process determines the continuity, performance and long-term success of the Charge. The officer transition manual assists in this effective transition process by:

- Helping to maintain the seamless continuity of the Charge's progress, goals and growth
- Building upon the achievements of the outgoing Executive Board
- Providing an opportunity for incoming officers to plan for the future
- Ensuring the successful transfer of important information

SAMPLE Transition Manual - President

POSITION: President

The President is responsible for establishing the Charge's goals and strategies and presiding over the entire Charge and e-board. He will oversee the budget and ensures resources are properly allocated. He ensures members of the eb-board and committee chairs meet their goals and are responsible for the overall accountability of the Charge to all stakeholders and the general public.

Adapted from: *America's Job Exchange*

CURRENT POSITION HOLDER: Andrew Green – 123-456-1847 agreen@union.edu

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DESCRIPTION OF POSITION:

Bylaw Article IV, Section 3. President

- The President shall direct the actions of the group in the execution of stated purpose. He shall call and preside at meetings of the Charge and of the Executive Board.
- The President shall serve as Chairman of the Executive Board.
- The President may provide for the needs of the Charge by appointing committees to aid in the execution of the goals, mission, and programs of Charge.
- The President or his designee shall act as the representative of the Charge at all occasions.
- The President shall fulfill such ceremonial or ritual duties as his office may from time to time require.
- The President shall discharge all duties necessary and proper to the effective maintenance of his office and the Charge as a whole.
- The President is responsible for maintaining a relationship with the Central Fraternity Office.
- The President is ultimately responsible for maintaining a relationship with the Interfraternity Council and Advisor and to an extent, the university at large.
- The President shall submit two frank and confidential letters to the CFO regarding the state of the charge one no later than October 30, and one no later than March 15.
- The President is responsible for attending or sending a delegate to all Interfraternity Council Meetings. Failure to do so will result in a \$25 fine.
- The President shall run all charge meetings ensuring each executive has the means to complete their tasks.
- Monthly meeting with our current IFC representative at the Office of Fraternity and Sorority life, assuring you set up a time for the next meeting to take place. Take notes to summarize the topics covered for the next Charge meeting, and set up a schedule to complete any business that must take place.

USEFUL INSIGHTS:

- a. Keep in the loop of the Presidents GroupMe, E-Board GroupMe, and TDX Business GroupMe.

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- b. Keep in the loop with the housing board, and property manager.
- c. Read the Presidents Manual on “thetadeltachi.net” to get a complete understanding of your duties along with how to go about them, and get familiar with the website as a whole.
- d. Be calm, understanding, and attentive to what others have to say before making any explicit decision.
- e. Always ask for others opinions, and be sure to truly listen and reason with what they have to say.
- f. Assure all members of your charge, and potential New Members are mentally healthy, and don’t be afraid to refer them to Health Center if it is out of the capacity of an untrained professional.
- g. Assure all officer positions have the tools they need to succeed in their positions by asking them, and giving them suggestions to help such as forming committees, reaching out to members in the charge/CFO for help.
- h. [Seven Steps to Running the Most Effective Meeting Possible](#) Forbes Leadership Forum
- i. [How to Run and Effective Meeting](#) wikiHow to . . .
- j. [Robert’s Rules of Order](#) online
- k. [Robert’s Rules of Order in Brief](#) Student Senate for California Community College (see also end of this document)

IMPORTANT CONTACTS:

NAME	POSITION	EMAIL	PHONE
Brian Bertges	Executive Director – Theta Delta Chi	bbertges@tdx.org	800-999-1847 x 2
Linda Lavin	Greek Advisor - UNH	llavin@unh.edu	123-456-7890
James Caughlin	Alumni Association President	JCaughlin@abc.org	123-456-7890
Larry Munroe	Housing Corp President	lmunroe@xyz.org	123-456-7890
John Lowry	Director of Charge Operations - Theta Delta Chi	jlowry@tdx.org	800-999-1847 x 3
Rick Wood	Educational Consultant – Theta Delta Chi	rwood@tdx.org	800-999-1847 x 4
Julian Weller	Charge Consultant – Theta Delta Chi	jweller@tdx.org	800-999-1847 x 5

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SCHEDULE OF DUTIES:

September

- a. Assure Rush goes smoothly.
- b. Continue Rush 365 efforts. Recruitment Chair must communicate with the student head of Recruitment from IFC asking if we are able to allow non-IFC registered new members into our house during Rush week as well as writing in our Recruitment policy how we plan to handle Rush 365 every year.
- c. Get ready for new year including Rush, programming, scheduling. A good contact for potential workshops throughout the year is the Office of Fraternity and Sorority living, CAPS office of Student Health Education and Promotion (SHEPS) that will hold free workshops at the house regarding Alcohol and Substance Abuse, Communication, Consent training, and Identity/Gender recognition.
- d. Encourage joining of student groups from your charge members by doing so yourself.
- e. Ensure academic success and comfort for members.
- f. Assure Brotherhood Chair has Brotherhood Retreat voted on for Fall quarter, and begins booking location.
- g. Assure as President we have some sort of leadership retreat set up that is to focus on teamwork, recruitment efforts, conflict resolution, and leadership.
- h. Begin preparing frank, and confidential letter to Theta Delta Chi CFO regarding the state of the charge that is due by October 15.
- i. Update President's Transition Manual as necessary throughout the year.
- j. Help set up calendar of the year.
- k. Meet with IFC representative.
- l. Meet with E-board regularly before and after Rush.
- m. Weekly Presidents meeting.

October

- a. Frank, and confidential letter to Theta Delta Chi CFO regarding the state of the charge is due by October 15.
- b. Continue leading Rush efforts for current New Members as compliant with Recruitment policy that was earlier registered with the student Recruitment Chair of IFC regarding Rush 365. If updates are needed communicate with Charge Recruitment Chair and student Recruitment Chair of IFC.

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- c. Assure Brotherhood Chair has Brotherhood Retreat booked for Fall quarter.
- d. Get yearly programming scheduled, such as TIPS alcohol training, CAPS training, etc as IFC, CFO, and needs of the house require.
- e. Make sure academic success is a primary goal for the start of the year.
- f. Focus on Midterm success, and assure stress levels are being managed.
- g. Make contact with other fraternities, sororities, and groups at UCLA for social and philanthropy events.
- h. Encourage members to join clubs/groups at UCLA to extend Rush efforts and campus inclusiveness.
- i. Confirm all other positions are comfortable, and diligent in their tasks.
- j. Meet with E-board.
- k. Preside over weekly Charge meetings.
- l. Weekly Presidents meeting.
- m. Bi-weekly check in with the Theta Delta Chi CFO.
- n. Monthly check in with IFC representative.
- o. Find delegates for Preamble Institute, and be sure to communicate the information to the Theta Delta Chi CFO. One delegate is covered by CFO, the other is covered by charge house, but scholarships are available by the Theta Delta Chi Educational Foundation, email jlowry@tdx.org for more info.

November

- a. Lead efforts for 365 Rush for current, or next class of New Members as compliant with Recruitment policy that was earlier registered with the student Recruitment Chair of IFC regarding Rush 365. If updates are needed communicate with Charge Recruitment Chair and student Recruitment Chair of IFC.
- b. Continue trying to meet new groups and encourage our members to join them.
- c. Confirm all other positions are comfortable, and diligent in their tasks.
- d. Prepare for finals and assure stress is being managed.
- e. Determine when initiation is for current New Member Class, set up at least TWO practice sessions for current members to practice initiation ritual.
- f. Meet with E-board.

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- g. Preside over weekly Charge meetings.
- h. Weekly Presidents meeting.
- i. Bi-weekly check in with the Theta Delta Chi CFO.
- j. Monthly check in with IFC representative.

December

- a. Ensure finals success is prepared, checking on everyone's level of stress and comfort.
- b. Make sure everyone's winter break plans are in order, and they have family to see.
- c. Confirm all other positions are comfortable, and diligent in their tasks.
- d. Continue 365 Rush efforts for next class of New Members, along with programming for next Rush as compliant with Recruitment policy that was earlier registered with the student Recruitment Chair of IFC regarding Rush 365. If updates are needed communicate with Charge Recruitment Chair and student Recruitment Chair of IFC.
- e. Determine when initiation is for current New Member Class, set up at least TWO practice sessions for current members to practice initiation ritual.
- f. Assure Brotherhood Chair has Brotherhood Retreat voted on for Winter quarter, and begins booking location.
- g. Meet with E-board.
- h. Preside over weekly Charge meetings.
- i. Weekly Presidents meeting.
- j. Bi-weekly check in with the Theta Delta Chi CFO.
- k. Monthly check in with IFC representative.

January

- a. Make sure Rush is in order.
- b. Assure Brotherhood Chair has Brotherhood Retreat booked for Winter quarter.
- c. Continue Rush 365 efforts as compliant with Recruitment policy that was earlier registered with the student Recruitment Chair of IFC regarding Rush 365. If updates are needed communicate with Charge Recruitment Chair and student Recruitment Chair of IFC.
- d. Make academic success for the next quarter a priority.
- e. Ensure officer positions realign with their tasks.

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- f. Ensure everyone's academic success and stress levels are being managed.
- g. Meet with E-board.
- h. Preside over weekly Charge meetings.
- i. Weekly Presidents meeting.
- j. Bi-weekly check in with the Theta Delta Chi CFO.
- k. Monthly check in with IFC representative.

February

- a. Make sure Midterms are a priority for everyone.
- b. Confirm all other positions are comfortable, and diligent in their tasks.
- c. Continue Rush 365 efforts as compliant with Recruitment policy that was earlier registered with the student Recruitment Chair of IFC regarding Rush 365. If updates are needed communicate with Charge Recruitment Chair and student Recruitment Chair of IFC.
- d. Ensure everyone's academic success and stress levels are being managed.
- e. Meet with E-board.
- f. Preside over weekly Charge meetings.
- g. Weekly Presidents meeting.
- h. Bi-weekly check in with the Theta Delta Chi CFO.
- i. Monthly check in with IFC representative.
- j. Prepare frank and confidential letter for IFC.

March

- a. Send frank and confidential letter to CFO regarding the state of the charge by March 15.
- a. Confirm all other positions are comfortable, and diligent in their tasks.
- a. Make sure Rush schedule is created and efforts are being put in for Rush 365 as compliant with Recruitment policy that was earlier registered with the student Recruitment Chair of IFC regarding Rush 365. If updates are needed communicate with Charge Recruitment Chair and student Recruitment Chair of IFC.
- a. Make sure everyone is prepared for finals.
- a. Assure everyone has plans for Spring Break.
- a. Ensure everyone's academic success and stress levels are being managed.

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- a. Assure Brotherhood Chair has Brotherhood Retreat voted on for Spring quarter, and begins booking location.
- a. Meet with E-board.
- a. Preside over weekly Charge meetings.
- a. Weekly Presidents meeting.
- a. Bi-weekly check in with the Theta Delta Chi CFO.
- a. Monthly check in with IFC representative.

April

- a. Vote on new officers following Psi Deuteron By-law procedure, and preside over induction. Be sure to practice with current officers TWO times before induction. During the remainder of quarter the new officer should shadow the old officer until the end of the quarter, diligently reading their transition manual, both Psi-Deuteron+National By-law description, and officer manuals found on thedeltachi.net. Slowly transitioning the new officers into duties handled by previous officers, and allowing new officers to run the final two meetings of the year with minimal guidance by previous officers.
- b. Assure Brotherhood Chair has Brotherhood Retreat booked for Spring quarter.
- c. Confirm all other positions are comfortable, and diligent in their tasks.
- d. Ensure everyone's academic success and stress levels are being managed.
- e. Make sure everyone is prepared for Midterms.
- f. Meet with E-board.
- g. Preside over weekly Charge meetings.
- h. Weekly Presidents meeting.
- i. Bi-weekly check in with the Theta Delta Chi CFO.
- j. Monthly check in with IFC representative.

May

- a. Confirm all other positions are comfortable, and diligent in their tasks.
- b. Continue Rush 365 efforts for either current class or summer as compliant with Recruitment policy that was earlier registered with the student Recruitment Chair of IFC regarding Rush 365. If updates are needed communicate with Charge Recruitment Chair and student Recruitment Chair of IFC.

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- c. Ensure everyone's academic success and stress levels are being managed.
- d. Find two delegates to go to Convention.
- e. Make sure everyone is prepared for Midterms.
- f. Meet with E-board.
- g. Preside over weekly Charge meetings.
- h. Weekly Presidents meeting.
- i. Bi-weekly check in with the Theta Delta Chi CFO.
- j. Monthly check in with IFC representative.

June

- a. Make sure everyone is prepared for finals.
- b. Ensure everyone's academic success and stress levels are being managed.
- c. Continue Rush 365 efforts as compliant with Recruitment policy that was earlier registered with the student Recruitment Chair of IFC regarding Rush 365. If updates are needed communicate with Charge Recruitment Chair and student Recruitment Chair of IFC.
- d. Assure everyone has summer plans to go to.
- e. Assure there are two delegates attending convention, and communicate with the CFO.
- f. Update President's Transition Manual as necessary throughout the year.
- g. Meet with E-board.
- h. Preside over weekly Charge meetings, assuring members transitioning to Alumnus Sign-out of the book of records.
- i. Weekly Presidents meeting.
- j. Bi-weekly check in with the Theta Delta Chi CFO.
- k. Monthly check in with IFC representative.
- l. Find delegates for convention.

July

- a. Assure all IFC summer regulations are being followed.
- b. Continue Rush 365 efforts as compliant with Recruitment policy that was earlier registered with the student Recruitment Chair of IFC regarding Rush 365. If updates are needed communicate with Charge Recruitment Chair and student Recruitment Chair of IFC.
- c. Ensure everyone's academic success and stress levels are being managed.

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- d. Update President's Transition Manual as necessary throughout the year.
- e. Plan summer EBoard/Charge retreat is completed or scheduled that focuses on teamwork, recruitment efforts, conflict resolution, and leadership you can contact rwood@tdx.org, our current IFC representative, and look at the previous years retreat for ideas.
- f. Assure both convention delegates can still attend.
- g. Keep in contact with IFC representative.
- h. Keep in good contact with the Theta Delta Chi CFO.

August

- a. Send two delegates for Convention.
- b. Get ready for new year including Rush, programming, scheduling a good contact for potential workshops throughout the year is the Office of Fraternity and Sorority living, CAPS office of Student Health Education and Promotion (SHEPS) that will hold free workshops at the house regarding Alcohol and Substance Abuse, Communication, Consent training, and Identity/Gender recognition.
- c. Make sure everyone has plans to get back to the house.
- d. Make contact with IFC representative to see if there is any yearly changes.
- e. Update President's Transition Manual as necessary throughout the year.
- f. Assure summer EBoard/Charge retreat is completed or scheduled that focuses on teamwork, recruitment efforts, conflict resolution, and leadership you can contact rwood@tdx.org, our current IFC representative, and look at the previous years retreat for ideas.
- g. Keep in good contact with the Theta Delta Chi CFO.
- h. Make sure social media pages are being ran for Fall recruitment.

Robert's Rules of Order in Brief

From: *Student Senate for California Community College*

Parliamentary Words

- Germane – bearing on whether the pending motion should be adopted
- Quorum – more than $\frac{1}{2}$
- Previous Notice – Alerts the voting members of a motion at next meeting
- Impartiality – perceived fair treatment
- Acclamation – if only one candidate, chair declare the candidate elected (unless by ballot)

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PHRASING:

Minutes:

- The Secretary will read the minutes (if previous meeting minutes were not distributed)
- Are there any corrections to the minutes?
- If there are no corrections, the minutes will be approved/presented. (No motion necessary)

Reports:

- May we have the Treasurer's Report? May we have the ____ Report

Unfinished Business:

- The first item of business is the motion on . . .
- The next item of business is . . .

New Business:

- Is there any new business?

Adjournment:

- Is there any further business?
- Since there is no further business, this meeting is adjourned.

Handling a Motion:

- I move that . . . (a formal proposal)
- Second
- It is moved and seconded that . . . (restate the motion)
- Are you ready for the question? Debates is now open.
- Is there any further debate? (Only the merits of the motion.)
- The question is on the adoption of the motion that . . .
- Those in favor of the motion, say 'aye'. (Determine if it is Majority vs 2/3 definition vs tie)
- Those opposed say, 'no'
- The 'ayes' have it, and the motion is adopted
- The next item of business is . . .

- (the 'noes' have it and the motion is lost. The next item of business is . . .)

- (Majority for election, if not reached – retake vote)

Unanimous Consent:

- Is there any objection to . . .?
- Is there is no objection, the motion is adopted.
- I object. (Follow the steps to handling a motion.)

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Voting:

- Division of the house
- Division of the house has been called for.
- Those in favor of the motion, will rise. (count)
- Please be seated.
- Those opposed will rise. (count)
- Please be seated.
- Those abstaining will rise. (count)
- Please be seated

Nominations from the Floor:

- Nominations are now in order for the office of XYZ.
- I nominate ____
- Are there further nomination. If not, nominations are closed.

Nominations Committee:

- Mr. President, the Nominating Committee submits the following nominations: Fro President, Brother ____, ...
- For President, Brother _____ is nominated by the committee.
- Are there further nominations for President?