Officer Transition Packet

Name:

Position:

Year:
What Makes Great Officers?

Officers who serve Kappa Delta Pi and the chapter are active participants, willing to accept responsibility either on their own or when asked. They display initiative and follow-through and are willing to learn leadership through their service to the chapter and the Society.

**Officer Expectations**

- **Serve as a member of the committee to which your position is assigned.** Attend all meetings and be willing to take on assignments as needed.

- **Maintain an officer folder.** Keep this folder, binder, or e-file organized and include everything someone would need to do your job. Include any resources, a record of the year’s activities, a calendar and/or timeline of your tasks, contact information, and resources you used during your term.

- **Train your successor.** Give your folder and resources to your successor, and look through them together. Answer questions, explain documents, and point out resources that were especially helpful to you. Check out the training and transition resources KDP has to support you.

- **Communicate regularly.** Touch base with other leaders regularly, sharing important updates.

Great officers must be creative, inventive, and progressive. They collaborate on projects and hold their fellow officers accountable to fulfill their responsibilities.

Newly elected officers may rightly feel excited, anxious, and overwhelmed. In fact, it is normal for a veteran officer to feel those things, too. Part of overseeing the management and direction of a chapter is enabling those around you to do their job. Follow these guidelines to ensure success:

- As an executive board, determine goals, assign tasks, establish beginning and ending deadlines, and communicate expected outcomes. Check to see if your programming is meeting the needs of participants before planning a repeat event.

- Hold everyone accountable, including officers and chapter members, but be sure to celebrate every accomplishment. Set a trend for the chapter that shares both the work and the celebrations.

- Review the goals regularly to ensure that they match with the needs of the chapter members.

For programming decisions in which your chapter members may want input, it is wise for the committee to narrow the options to two or three and then ask the chapter to vote. Remember, your fellow chapter members will be more interested in executing the events they had a hand in planning!

**Go Forth to Lead and Inspire**

- Familiarize yourself with all of the KDP Chapter Resources available to you on the KDP website.
- Learn more about the Society outside of your chapter. Explore the KDP website for benefits, scholarships, and new initiatives. Be an advocate for the Society and the profession!
- Need to access a chapter roster, update officers, or promote your social media presence? As an officer, you have access to these items from the member login on the KDP homepage, or click here.
- Check in with your Regional Chapter Coordinator. Kappa Delta Pi Headquarters has dedicated staff to assist you and offer ongoing support, for anything from social media assistance to fundraising, and membership questions. We are here for you!
Officer Transition Reflections – Outgoing Officer

Thank you for all you have done to serve the chapter and Kappa Delta Pi during your time as a chapter officer. We don’t want to lose your valuable wisdom, so spending a few minutes to consider answers for the following questions will help guide your successors for years to come. Feel free to add additional questions or information you would like to pass along for the future.

Outgoing Officer Reflection Questions

1. What is your proudest accomplishment as an officer?
2. What do you think could have gone better during your tenure?
3. What do you wish you would have accomplished if you were able?
4. What was the best part about being a chapter officer for you?
5. What is something you wish you knew when you first started in your role?
6. What is something that the next officer should do to be a great officer? What’s the best piece of advice you’d like to give to them?
7. Based on your work as an officer, where do you see the chapter in 3 years (consider: recruiting, programming, fundraising, etc)?
Officer Transition Reflections – Incoming Officer

Even though you are just stepping into your position, please take a few minutes to consider your motivations, goals, and what you can bring to the chapter during your tenure. Feel free to add any additional questions or information you would like. Keep these answers in your position binder to help future officers as well. Then you can look at these answers as an outgoing officer to remember where you started!

Goal-Setting for New Officers

1. Why did you join Kappa Delta Pi?
2. Why did you choose to serve as a chapter officer?
3. What is a skill you bring to the chapter’s executive board?
4. What is something you would like to accomplish during your tenure?
5. What makes you most nervous about being a chapter officer?
6. What legacy would you like to leave in your position?
## Chapter Information & Contacts Log

### Kappa Delta Pi Contact Information

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<tr>
<th>Name</th>
<th>Position</th>
<th>Email/Web</th>
<th>Notes</th>
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<tr>
<td>TABCO</td>
<td>KDP Store</td>
<td>Store.KDP.org</td>
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<tr>
<td>Our HQ Contact -</td>
<td>Regional Chapter Coordinator</td>
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The store is where we purchase Membership Certificates for initiation. You can also buy merchandise and apparel. The Regional Chapter Coordinator is your contact person at the Society Headquarters, ready to help with anything you could need to help run the chapter.

### Important Log-In Information

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<tr>
<th>Site</th>
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A chapter can update this information on MyKDP in the “Chapter Profile” tab under “Chapter Management”

### On-Campus Contacts

<table>
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<tr>
<th>Name</th>
<th>Office</th>
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### Off-Campus Contacts

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<th>Name</th>
<th>Organization</th>
<th>Email/Phone</th>
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Bank Information

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<th>Location</th>
<th>Chapter Budget for the Year</th>
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The Chapter Treasurer and/or Counselors maintain access to accounts and keep track of spending, but it is good for everyone to be aware of this information.

Nearby KDP Chapters

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<tr>
<th>Institution</th>
<th>Contact Person</th>
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If you have worked with other KDP chapters in your area, keep in touch. You never know when a great opportunity will knock!

Major tasks for the position:

Important dates:

Other important information:
Chapter Goal Setting Guide

Tips for Setting Goals for the Chapter

A good leader can create impressive change by having the vision to break out of the norm and aim for great heights, as well as have the resources and plan in place to initiate the steps necessary to get there. An essential characteristic of good leadership is to envision what can be and then manage the goals to get there. So, where do you start for your chapter?

The Chapter Member Engagement Model!

Consider these questions:

- **Recognition** – You honor members when you invite them to join, and a second time when you induct them. How else can you acknowledge and appreciate your members?
- **Member Development** – How do you support and nurture the growth of your members both personally and professionally?
- **Community** – How do you encourage a sense of belonging in your chapter, your School of Education, your institution, and your community?

Think about what your chapter is known for on campus and in your community. What do you want to repeat? How can you make these opportunities bigger, better, and different? If you’re trying to build a support network, you would want to focus on growing your chapter and including many levels of educators. For a service-oriented chapter, you could focus on building alumni partnerships and community organizations to have a multitude of project opportunities. Consider what behaviors you’d like to see within your chapter or the values your chapter would like to develop and express (i.e. a highly supportive group that helps each other or a chapter that is focused on leadership development).

What do you want to try that is new? Where do you get these ideas? Start with the passions of your officers. Check out the Chapter Guidebook, Programming, and Member Engagement pages for additional ideas.

Valuable things to remember:

- Collectively as officers, you can make a huge impact in the lives of your members, at your institution, and in your community. Follow your passions, use effective planning and delegation, and have a clear vision and direction for the chapter. Share this with all of your members.
- Leaders who believe in the shared chapter mission and work toward the chapter goals are an inspiration and a resource for everyone. When you lead by example, understand that programs and events will not always go as planned. Be prepared and rise to the occasion; leaders are always ready with a Plan B (or Z!).
- Review your chapter goals at the end of every semester. If you are not moving toward the goals, or your chapter members’ needs are not being met, adjust your goals to ensure you are providing programming and events that work best for your chapter.
How to Get Started with Setting Goals

1. Set big, long term goals that extend beyond your term — consider what kind of legacy do you want to leave for your chapter? What behaviors would you like to see within your chapter develop in the next few years?
   - In 3 years, the chapter will host a large and award winning Celebration of Teaching project that serves multiple schools/teachers.
2. Begin narrowing it down to what you can do this year.
3. Set up SMART (Specific, Measureable, Attainable, Relevant, Time-bound) goals for the year.
   - EXAMPLE: By April 1, the chapter will host two after school events at two different schools to give teachers supplies and an enjoyable time to provide relaxation and practical support.
4. Break down the goals into tasks and assign the tasks to individuals with set deadlines.
   - EXAMPLE:
     i. Alex will make contact with two principals and set dates with them for the events by November 15.
     ii. Jordan will organize a supply drive with members and/or the community, and a local non-profit that provides supplies to teachers by March 1.
     iii. Carey will organize food by March 10.

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<th>3 year goal</th>
<th>SMART GOAL for this year</th>
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