



Lambda Chi Alpha

____ Zeta

<Address>

<Address>

April 1, 2003

Dear Josh,

Congratulations on attaining the office of High _____. My tenure as the _____ was one I will never forget. I certainly hope you have an even better experience than I did while in this position.

This letter and the following notebook will serve as an official introduction and basic transition into the office of High _____. Prior to the end of your term, you and all other incoming and outgoing officers will participate in an Officer Transition Retreat. The retreat will supplement this manual and will facilitate even further understanding of the responsibilities and opportunities of the office of High _____. The Officer Transition Notebook and retreat, if used properly, will empower you to take this office to the next level of operations.

Your skills and abilities as a leader will no doubt serve you well throughout your time in office. If you have any questions throughout your term of office, please do not hesitate to contact me. Enjoy the reading.

Yours in ZAX,

Joe Brother
Outgoing High _____
Mu-Mu Zeta

Table of Contents

Preface: *Letter to Incoming Officer*

1. Semester-long Chapter / Colony Calendar (Not Included)
2. Chapter / Colony Goals (Not Included)
3. "High _____ for Dummies"
4. Office Budget
 - A. *Previous Officer Budget*
 - B. *Current Officer Budget*
5. Meeting Minutes (Not Included)
6. Key Contact Information
7. Officer Goals
 - A. *Previous Officer Goals*
 - B. *Current Officer Goals*
8. Do's and Don't's
9. Documentation of Previous Programming (Not Included)
10. Documentation of Current Programming (Not Included)
11. Blank Event Planning Forms (Not Included)
12. Officer Disk (Not Included)

High ____ for Dummies

The “High for Dummies” section of this notebook is intended as a general guide or structure by which the incoming officer should follow in order to reduce the learning curve associated with taking a new office. By utilizing this basic structure, officers will “hit the ground running” by understanding the basic expectations and deadlines of the office.

Note: *This section of the notebook should be updated before the end of YOUR officer term. As this office continues to evolve and achieve furthered success, new programs and ideas must be added, in order to ensure increasingly successful operations.*

What to Do	To be Completed By...
○ Set a SMART goal for the amount of events to be achieved within each semester of your office...	One week prior to the High Zeta Retreat
○ Set tentative dates for each event...	One week prior to the High Zeta Retreat
○ Create a list of tentative themes, itemized costs, and locations of all events...	One week prior to the High Zeta Retreat
○ Appoint a chair to coordinate each event during the upcoming semester...	By the end of the second week of the semester
○ Have the chair of each event appoint a set-up and clean-up crew for each event...	Two weeks prior to each social event
○ Submit external Event Planning Forms to the High Iota...	No later than 40 days prior to the date of the event
○ Submit internal Event Planning Forms to the High Iota...	No later than 12 days prior to the date of the event.
○ Attend all Risk Management Task Force Meetings...	<i>Ongoing</i>
○ Appoint the Historian to take pictures at all events and keep as documentation for this officer notebook...	By the end of the third week of the semester
○ Retain copies of Event Planning Forms and any other information or documentation created or utilized during the tenure of office...	<i>Ongoing</i>
○ Update this notebook...	Two weeks prior to the end of the semester
○	

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Previous Officer Budget

Fall 2002 for the High Epsilon

	<u>Event Name</u>	<u>Estimated Date</u>	<u>Est. Cost</u>	<u>Actual Cost</u>
1	Delta Gamma Social	September 5, 2002	\$200.00	\$152.29
2	Social - Women's Soccer Team	September 16, 2002	\$150.00	\$150.00
3	Halloween Party	October 17, 2002	\$500.00	\$472.00
4	Faculty/ Staff Golf Outting	October 28, 2002	\$700.00	\$543.00
5	Day-Glo Social	November 1, 2002	\$250.00	\$203.32
6	Thanksgiving Dinner Date	November 10, 2002	\$500.00	\$500.00
7	Grade Competition BBQ w/ Adpi	November 27, 2002	\$200.00	\$124.12
8				
9				
10				
Ttl. Estimated vs. Actual Events Budget			<u>\$2,500.00</u>	<u>\$2,144.73</u>

	<u>Other Expenses</u>	<u>Est. Cost</u>	<u>Actual Cost</u>
1	Bus Rental	\$300.00	\$300.00
2	DJ Rental	\$100.00	\$120.00
3	Flowers for Delta Gamma	\$30.00	\$23.23
4	Invitation Printing	\$40.00	\$35.00
5	Thank you cards	\$30.00	\$22.00
6			
7			
8			
9			
10			
Ttl. Estimated vs. Actual "Other" Expenses		<u>\$500.00</u>	<u>\$500.23</u>

Total Est. vs. Actual Officer		
Budget for the Semester	<u>\$3,000.00</u>	<u>\$2,644.96</u>

Current Officer Budget

<Semester & Year>
for the High <Office>

	<u>Event Name</u>	<u>Estimated Date</u>	<u>Est. Cost</u>	<u>Actual Cost</u>
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
Ttl. Estimated vs. Actual Events Budget			<u>\$0.00</u>	<u>\$0.00</u>

	<u>Other Expenses</u>	<u>Est. Cost</u>	<u>Actual Cost</u>	
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
Ttl. Estimated vs. Actual "Other" Expenses			<u>\$0.00</u>	<u>\$0.00</u>

Total Est. vs. Actual Officer			
Budget for the Semester	<u>\$0.00</u>	<u>\$0.00</u>	

Officer Contacts

<u>Name</u>	<u>Business/ Expertise</u>	<u>Contact #</u>	<u>E-mail</u>	<u>Contributions</u>
Joe Ortega	Papa John's Pizza	573-882-7573	jortega@pjohns.com	20 percent discount on pizza for event
Matt Wilkens	Wilkens and Longo Law Associates	573-836-7223	mwilkens@wandLong.com	Free legal Counsel
Jen Langer	University Outdoor Rec.	573-882-2258	jlanger@usf.edu	\$30 off of Tent Rental
Helen Winter	Missouri Bus	573-823-8881	helwinter@mbus.com	10 percent discount on bussing for event
Rod Walters	WKOW	314-213-8343	rodwalt@wkow.com	Free Public Service Announcement

Previous Officer Goals

S - Specific
M - Measurable
A - Attainable
R - Relevant
T - Timely

<u>S.M.A.R.T. Officer Goals</u>	<u>% Complete</u>	<u>Description</u>
Conduct 5 quality social events by May 1, 2003.	80%	planned & executed four events
Conduct a White Rose Formal by Fall 2003.	40%	reservations made, still need invitations, dinner choice, set-
Attend every Risk Management Task Force during the tenure of office.	100%	attended all RMTF meetings
Appoint a White Rose Formal Team by February 28, 2003.	0%	team not appointed as of yet
Complete event planning forms for all events.	100%	all event planning forms complete

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Current Officer Goals

- S - Specific
- M - Measurable
- A - Attainable
- R - Relevant
- T - Timely

<u>S.M.A.R.T. Officer Goals</u>	<u>% Complete</u>	<u>To be Completed By...</u>

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Officer Do's and Don't's

How much easier would your job be if you could get by without falling into some of the same traps as your predecessor? In this way, learning from other's mistakes and triumphs can greatly add to your office's success. This section of the notebook will allow you, as the outgoing officer, to relay the vital pieces of information that helped or hurt you throughout your term of office.

Note: For optimum results, you may want to utilize this section as a "journal." As you encounter positive results and/or challenges within your office, jot (or type) your findings in this section.

✓

✓

✓

✓

✓

Event Follow-up Report

The Event Follow-up Report should be used on a regular basis following all events to help determine if it should be done in the future and to identify any needed changes. In addition, this follow-up report will assist the incoming officer to plan and execute similar events.

Event Name: Day-Glow Social

Officer in Charge: High Epsilon

Date of Event: 2/5/03

Time of Event: 6 p.m.

Duration: 3 Hours

Event Type: Social/ Mixer

Event Purpose: To better acquaint the chapter with Delta Gamma

Cost: \$45.00

Event Summary: This social was a blast! Over 100 invited guests showed. Attendance from the brotherhood was amazing. Blacklights and a smoke machine were the highlight of the event. We bought 100 glow sticks for .50 each. Great time.

Rating (1 (Poor) – 5 (Excellent)): 1

New Ideas/Changes: Next time we need to allow at least 5 hours for set-up, only use masking tape on the walls, anything but will remove the paint. Need a new black light tub as one broke suddenly. Ordered Vertigo Ball Bulbs for next time. Only other thing would be to order everything earlier than one week before, like 2-3 weeks before.

Contacts: Dave Amato, Image Apparel -- 555-555-5555

Event Follow-up Report

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Event Name:

Officer in Charge:

Date of Event:

Time of Event:

Duration:

Event Type:

Event Purpose:

Cost:

Event Summary:

Rating (1 (Poor) – 5 (Excellent)):

New Ideas/Changes:

Contacts: