Delta Gamma

New Collegiate Officer Election Process

Fall 2024

Agenda

- Overview of Changes
- Share the Preparation/Planning for the New Process
- Review Process Beginning-to-End
- Discuss Elections Committee and their Role
- Discuss Officer Roles in Elections Process
- FAQs
- Resources Available
- Q&A

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Overview of Changes

Slating process	→	Ballot process

Ballot Process:
1. Members nominate members for CMT and HB roles (elected positions)
2. Elections committee creates the ballot using member nominations
3. CMT and HB roles elected by popular vote using ballot

Benefits:
- Challenges are no longer necessary or are a part of the process
- Paper voting → electronic voting
- Process caters to varying chapter size

Additional Changes

- **Changes in elections process leaders:**
  - vp: member education and president share duties for the elections process
  - Elections Committee (formerly nominating committee) varies in size based on chapter size

- **Officer Onboarding is more comprehensive, and places less emphasis on outgoing officer transitioning incoming officer.**

- **Added guidance/clarity for:**
  - Virtual/study abroad members in the elections process and voting procedure
  - Members on Excused Status running for office
  - New members and their role in elections
  - Officers holding multiple roles
  - Special Election process (any election occurring outside of the normal election process)
  - Electing at-large members (in addition to section in Bylaws & Standing Rules)

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Looking Back...

What was our goal?

- Provide clarity & transparency
- Allow for more voices in the elections process
- Focus on education of members
- Reduce barriers to chapter leadership
- Tailor process to chapter size

How did we get here?

- Committee work – beginning November 2022
  - Elections Committee
  - Transition Committee
  - Committees included DG alumnae and collegiate members, volunteers, and EO staff
- Feedback from Collegiate Advisory Board
- Research of peer NPC groups
- **Year-long pilot process including 12 chapters across all regions ranging in size from 20ish to 300+**

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Thank you to our pilot chapters!

- Alpha Kappa-Washburn
- Alpha Tau-Butler
- Beta Gamma-Utah
- Beta Mu-Bowling Green
- Delta Phi-UC Irvine
- Epsilon Delta-Washington & Jefferson
- Eta Sigma-Charleston
- Eta Tau-Christopher Newport
- Gamma Tau-TCU
- Gamma Zeta-LSU
- Tau-Iowa
- Theta Alpha-Cal Poly

Feedback from Pilot Chapters

- **Majority of feedback received was positive**
  - 2/3^{rds} respondents indicated they preferred the new ballot process over the former slating process
- **Positive feedback:**
  - Gave voice/vote to the chapter members.
  - Liked the elections committee variations per chapter size
  - Process was more transparent/chapter knowing what was happening "behind the scenes"
  - More straight-forward, streamlined and seemed shorter
  - Appreciated vp: member education being more involved in the elections process/help to the president
  - Finality of voting on the ballot – no challenge process

Feedback from Pilot Chapters

- **Critical feedback was incredibly helpful to make changes**
- Transparency of the process made it more public
  - Addressed: allow chapters to customize how they inform candidates during the election meeting (i.e. stepping into the hallway)
- Pushback from members if Elections Committee chose to omit someone from the ballot
  - Addressed: provided further guidance and "things to think about" in the Handbook for how Elections Committee should make these decisions
- Long chapter meeting with multiple speeches
  - Addressed: allow for chapters to choose what CMT and Honor Board roles require speeches, as well as encourage other ways of candidates' sharing information prior to the vote (pre-recorded videos, Candidate Info Slide)

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Elections Process

1. President **reviews positions available**, compared to BLSR and notes **members eligible** in Anchorbase (same as current process)

2. Members submit **Officer Interest Form** (same as current process)

3. Chapter **members nominate other members** for ballot at a chapter meeting (similar to current recommended slate process)

4. Elections Committee **creates the ballot** using member nominations

5. **Chapter votes on each CMT and HB** position from the prepared ballot

6. **Elections Committee appoints directors** with chapter input

7. **Officer Onboarding begins**

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Elections Process in Phases
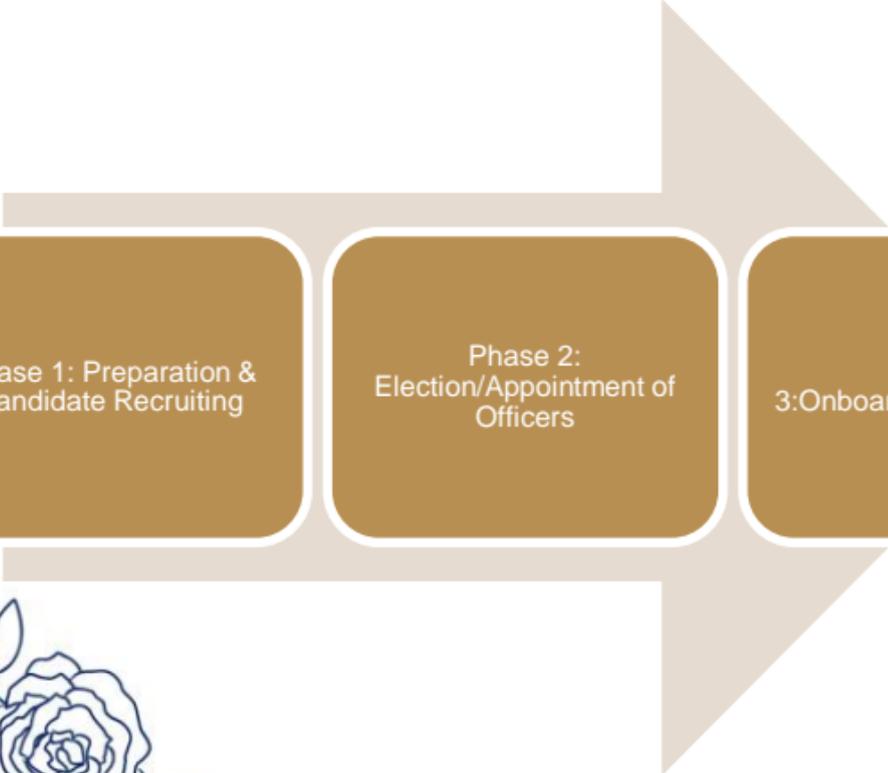
| Phase 1: Preparation & Candidate Recruiting | Phase 2: Election/Appointment of Officers | Phase 3:Onboarding/Offboarding |

Phase 1: Preparation & Candidate Recruiting

- **President completes Anchorbase tasks**
  - Confirming eligible candidates and director roles specific to chapter
- **Officer Interest Forms released**
  - Sent automatically the day after President confirms eligibility in Anchorbase; president determines due date & communicates to chapter
- **Vp: member education presents Elections Overview Presentation**
  - Should be at a chapter meeting; PPT will be provided
  - Can be the same chapter meeting where at-large members are elected
- **Elections Committee members elected**
  - Refer to BLSR on how chapter elects at-large members, and the Handbook for how many you should elect
  - Examples provided in Elections Handbook if BLSR is unclear
- **Elections Committee meets for an introductory meeting** (further details in Handbook)

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Phase 2: Election/Appointment of Officers

- **Candidate information is shared with chapter members**
  - Candidate Information Slides (template in DG Library)
  - Elections Committee Meeting PPT should include names of what members are running for what positions and can be sent to the chapter ahead of Elections
- **Ballot Nomination takes place at chapter meeting**
  - Form is shared via a link from the chapter president to members
  - Members may only nominate one member per role, and each member should only be nominated for one role
- **Elections Committee meets to create the ballot**
  - Chapter President pulls report of Ballot Nomination Form from Anchorbase
  - Percentage of required nominations varies per chapter and is outlined in Handbook
- **Elections take place at chapter meeting**
  - Detailed procedure is outlined in Handbook
  - A runoff is held if no candidate receives more than 50% of the vote
- **Chapter members complete Director Recommendation Form**
  - Form is shared via a link from the chapter president to members

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BLSR Elections Section

ARTICLE IV. ELECTION PROCEDURES

Section 1: ELECTION GOVERNANCE: All election procedures are governed by the *Collegiate Chapter Officers Manual, Elections Handbook,* as well as the Fraternity Constitution and Fraternity policies. Chapters may create their own process for election speeches in Section 2, Election Procedure, under this heading.

Section 2: ELECTING AT-LARGE MEMBERS: All initiated members in good standing are eligible to serve on elections committee as an at-large member. The number of at-large members is determined by chapter size as outlined in the Elections Handbook. The process for electing at-large members is below: _____

Section 3: ELECTION PROCEDURE: Candidates listed on the ballot for the following positions will have the opportunity to give a speech prior to the chapter vote: _____ Speeches will be _____ seconds/minute(s) long and given in alphabetical order by last name. For positions that are not permitted a speech, their process is the following: _____

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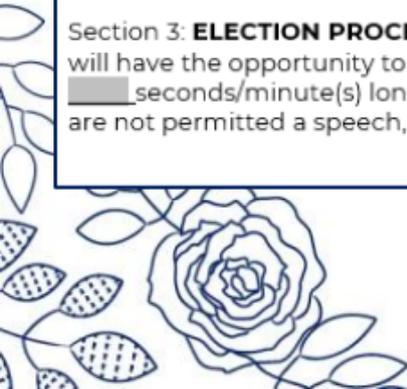
Sample Voting Form

Sample Elections Ballot

This is a sample ballot for the Elections chapter meeting. You may create your own ballot using guidance from the Elections Handbook or duplicate this ballot for each officer position.

lesliepedigo@gmail.com Switch account

Not shared

* Indicates required question

Your Name (first and last) *

Your answer

Cast your vote for vp: social standards. *

○ Anna Boyd Ellington

○ Mary Comfort Leonard

○ Eva Webb Dodd

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**Phase 3:
Onboarding/Offboarding**

- **Chapter President updates Officer Roster in Anchorbase with new officers**
  - President can input a future date as the "effective" date – does not need to wait until the day they transition
  - Once the effective date occurs, Anchorbase access transfers over
- **One on one officer transition meetings are held**
  - Working on a Pursuit module to help current officers transition successors
- **Formal Onboarding Workshop is held for new officers**
  - Updated Onboarding Workshop will be uploaded to DG Library at a later date
- **Officer Installation is held**
  - This is the official date new officers take office
  - Whatever your current transition timeline is (especially for deferred recruiting/quarter schools) – that can remain

Elections Committee

- **Officers & Members**
    - President (voting member)
    - vice president: social standards (voting member)
    - vice president: member education (voting member)
    - ATC (non-voting member)
    - A specific number of members at large, according to chapter size; could be 2-8 (in Handbook)
    - ** Committee will be an odd number of people in order to avoid ties in voting*
- **Purpose of Committee:**
    - Review interested candidates & chapter nominations
    - Ensure eligibility of members and address any potential major concerns
    - Create the ballot
    - Appoint directors chapter input

Elections Committee Meetings

- **Meeting 1: Introductory Meeting**
  - Explain the role of Elections Committee
  - Discuss the new process + specifics regarding creating the ballot
  - Reiterate expectations and confidentiality
- **Meeting 2: Ballot Creation**
  - Occurs directly after the nomination chapter meeting
  - Review nominations from chapter
  - Create ballot, reviewing each candidate's eligibility and ensuring they have the correct amount of nominations from the chapter
  - Ensure no vacancies
- **Meeting 3: Appointing Directors**
  - Occurs after elections chapter meeting – within one week
  - Elections Committee reviews input from chapter members via Director Recommendation Form
  - Appoints directors

Roles in Elections

Chapter president & ATC

- Chapter president serves as chair of Elections Committee and facilitates process
- ATC sits on Elections Committee as a non-voting member
- President does vote in Elections Committee proceedings and in the chapter election
- ATC approves the ballot, including anyone being removed/added to ballot

vp: member education & member education adviser

- Serves on Elections Committee
- Educates members & new members on the elections process
- May assist with running elections meeting

Technology & Elections

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| Made by Chapter	Provided in Anchorbase/Members Only Site	Reports	Tasks in Anchorbase
• Voting forms for Electing Elections Committee at-large members • Voting form for electing CMT and Honor Board positions • Both of these we recommend Google forms – "how to" guide provided at a later date in DG library	• Officer Interest Forms – sent automatically after President marks members as eligible • Ballot Nomination Form – created automatically, but President must send link to members • Director Recommendation Form – created via automatically, but president must send link to members	• Officer Interest Forms - viewable in members only site, and can be viewed by all chapter members • Ballot Nomination Form – President can pull report from Anchorbase • Director Recommendation Form – President can pull report from Anchorbase	• Officer Certification Task • Identify Officer Position task • Update officer roster after elections have been completed
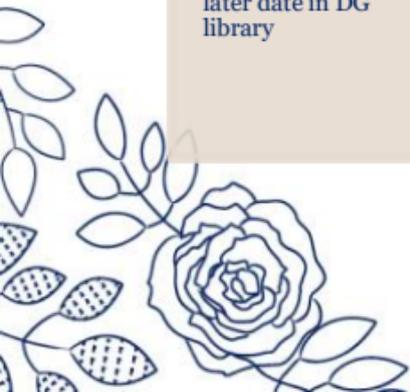
FAQs

- **New members in the elections process:**
  - Must be initiated at the time they are being considered for office (same as before)
  - Encourage new members to be initiated prior to director appointment Elections Committee meeting
- **Abroad members/members on Excused Status:**
  - Up to the chapter on eligibility to run for office and/or process to allow them to vote
  - We encourage chapters to consider allowing members on these status' a vote in the chapter meeting – but that does need to be included in chapter's quota
- **Adding/removing director roles prior to Elections:**
  - Director roles MUST match your current BLSR
  - If changes are desired – chapters must work with their RCS

Resources

- **The Pursuit modules**
- **Elections Handbook**
- **"How-to" guide for Google Forms** to create voting ballots
- **Elections Overviewe Presentation –** vp: member education to deliver to chapter
- **Elections Meeting & Voting Procedure Slide Deck Template**
- **Formal Onboarding Workshop** Agenda Template
- **Human resources**
  - Collegiate officers → advisers → RCS/CAC/NCC → Dir: Chapter Operations
  - CDC and/or CDS at Executive Offices

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Next Steps

- Review handbook/available materials
- Ask questions!
- **Work with your RCS/CAC/NCC & CDS to review and make any changes to your Bylaws & Standing Rules or calendar that are necessary.**
    - Calendars should be reviewed for timing around Initiation & Elections
    - New members should be initiated prior to ballot nomination meeting, or post-elections. We recommend new members being initiated prior to director appointments.
- Complete Pursuit module when it launches September 1
- Meet with your vp: member education and ATC to create a plan and timeline to execute the elections process, using available resources and dates on Anchorbase calendar

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Thank you!

- Thank you in advance for leading our Fraternity through this change!

- If you have questions, don't hesitate to contact your chapter's RCS/CAC/NCC and/or chapteroperations@deltagamma.org