



## Chapter Officer Transition Checklist

The following is a list of specific transition information that new officers should acquire from outgoing officers prior to taking office. The list is not intended to be exhaustive; please add chapter specific information resources to better tailor to your chapter's needs.

### Officer Specific Materials

- A copy of the constitution, by-laws, chapter policies, and procedures
- Officer Job Description – as outlined in by-laws and revised by outgoing officer
- Goals and objectives from the last year
- Status report for ongoing projects
- Previous meeting minutes and officer reports
- Financial Records/Budget relating to officer position

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### University Specific Materials

- Chapter Officer Update Form (FSA Website)
- University Polices & Information
- Governing Council Information (by-laws, meeting times, contact information)

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### Contact Information For:

- Inter/National Headquarters
- Chapter/Graduate Advisor
- Other Advisors
- House Corporation Chair
- Fraternity & Sorority Affairs
- University Resources
- Emergency Contact Information (police, fire, safety)

NOTES:

### Other

- Historical Files
- Planning calendar that denotes critical dates (anniversaries, academic holidays, etc.)

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# Chapter Officer Transition Formats

Independent Study: Incoming officers review officer expectations and responsibilities individually and then discuss them with outgoing officers.

Learning Contracts: Developed individually between incoming and outgoing officers, learning contracts pre-establish a list of skills and tasks that incoming officers must satisfy in order to be eligible to run for/hold a specific office in the organization. Learning contracts are best established by a chapter leadership team that examines the officer role from a variety of perspectives. Once the list is complete, incoming officers meet with outgoing officers to identify their skill level for each condition. Next, the outgoing officer provides the necessary training so that the incoming officer is able to gain the necessary skills, knowledge and tasks to be successful.

Shadowing/Mentoring: Incoming officers are paired with outgoing officers for a specific period of time to learn position basics and to observe the outgoing officers. Through discussion and interaction, outgoing officers share expertise, insight and advice for the incoming officers. Through a “shadowing” process, new officers are elected and serve for an “elect” (ie: president elect) term with the current officer to learn processes, meet people and transition materials.

Retreats/Workshops: Although they can take different formats, retreats and workshops provide an opportunity for incoming and outgoing officers to transition materials and discuss pertinent issues. All retreats and workshops should be planned in advance and should seek to address specific goals and objectives. A sample retreat outline is included in the Officer Transition packet.

## Transition Questions

The following is a list of helpful questions to ask and answer during transition meetings.

- What do you consider to be the responsibility of your office?
- What do you wish you had done during your time, but did not?
- What did you try that did not work? Why?
- What problems or areas will require attention within the next year?
- Who/what resources were the most helpful in getting things done?
- What key relationships need to be maintained/built?
- What are the immediate priorities of this office?
- How does your office intersect with other offices on the executive board?
- What specific paperwork is the responsibility of your office?

# Outgoing Officer Evaluation

Officer Name: \_\_\_\_\_

Position: \_\_\_\_\_

Please list the top responsibilities of your office as outlined by the chapter's by-laws:

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Please complete this chart of important contacts for your position:

Name	Title	Phone Number	Email	Importance of Contact

List 3 successes/accomplishments that you achieved in your position:

- 1.
- 2.
- 3.

List 3 important pieces of advice for the incoming officer in this position:

- 1.
- 2.
- 3.

List any outstanding issues/unfinished tasks that the new officer will encounter when taking office: