Plan for Newly Elected Officers and Transition Checklist

Officer transition involves a series of discussions with previous officers, the counselors, and newly elected officers over a period of time. Thorough planning and documentation are needed before, during, and at the end of any officer’s term for a successful transition and continued chapter growth.

Review Role/Responsibilities of the Position

Start with the chapter bylaws and the specific officer materials for your position. As you conduct your review, prepare a list of questions to ask the outgoing officer about the operating practices in place for completing these duties. Set up a day and time to meet with the outgoing officer.

One-On-One Meeting Checklist

**Outgoing Officer:** Make this meeting as comfortable and relaxing as possible. Make sure you bring your binder, documentation, reports, and supplies. Do not breeze through this information. Remember that after serving for a full year, you are very familiar with this information and the responsibilities of the office, but it is all new to the incoming officer. Take time to explain this information and review everything on the checklist:

- ☐ Give your cleaned out, organized binder to the new officer and explain all the contents.
- ☐ Highlight the duties that go along with the office but are not part of the officer’s description.
- ☐ Review the past year’s calendar and explain programs and events.
- ☐ Show and explain forms and files that have been started over the past year.
- ☐ Review both the chapter and the specific officer position budget *(if you don’t know this information, meet with the Treasurer before you have the one-on-one).*
- ☐ Describe the supplies and materials that this position requires. Explain where the supplies are stored and how to get additional supplies as needed.
Together, brainstorm some goals for this office.

☐ Set objectives for the new goals.

☐ Discuss the timeline and deadlines for this office and the importance of meeting deadlines for events/forms.

☐ Share key campus and community contact information and processes utilized.

**Incoming Officer:** You will have plenty of questions. Be ready to discuss your assessment of the chapter and vision for the upcoming year. As part of the discussion ask the outgoing officer about . . .

☐ the three most important or largest responsibilities associated with the position.

☐ the amount of time necessary to complete task.

☐ the most difficult responsibilities of the job.

☐ factors that make completing tasks difficult (lack of time and money, resistance from others, etc.).

☐ the most rewarding accomplishments of the past year.

☐ personal goals if they had this position for another year.

☐ things they would do differently.

At the end of the meeting share phone numbers and email addresses and keep in contact for support, encouragement, advice, and to share successes.

Date Completed:

Outgoing Officer’s Signature: ____________________________________________

Incoming Officer’s Signature: ____________________________________________

**Keep this document in your binder for reference!**