



## 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 organization specific information resources to better tailor to your organization'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
- **NOTES:**

### University Specific Materials

- Recognition Guidelines
- University Policies & Information
- Hazing Policy
- Membership: Intake/Recruitment & New Member Education Policies
- Event Policies (Office of Student Activities)
  - Social Event Guidelines: Registration Process, Guest List Templates, Third Party Vendor Checklist, Security Vendor Checklist, BYOB Guidelines, BYOB Punch Cards, BYOB Bartender Check-in List, NIC BYOB Guidelines,
- Risk Management Policies: Alcohol, Town & Gown, FIGP Risk Management Policy
- Philanthropy and Service Guidelines
- Fraternal Conduct Board
- University Space Reservation System and Space Use Policies
- Student Org Registration
- Student Allocations
- Student Org Resources: Advertising, Travel Forms
- **NOTES:**

### Contact Information For:

- Inter/National Headquarters
- Chapter/Graduate/Faculty/Staff Advisor
- Other Advisors
- OFSA Staff: Assistant Director of Student Activities for Fraternity & Sorority Affairs, Graduate Associate.
- College Resources (OSA, Dean of Students, Residence Life, West Center, Career & Civic Engagement, Diversity & Student Engagement, etc.)
- Emergency Contact Information (police, fire, safety)
- **NOTES:**

### Other

- Council Information (by-laws, meeting times, contact information)
- Historical Files
- Planning calendar that denotes critical dates (anniversaries, academic holidays, etc.)
- **NOTES:**

## 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 & answer during transition meetings.**

- What do you consider to be the responsibility of your office?
- What do you wish you had done, 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 built?
- What should be done immediately?
- How did you work with other officers?
- What specific paperwork is required of the officer?

# Transition Worksheet

Officer Name:

Position:

From the chapter/council By-Laws, please list the top responsibilities that the officer in your position is responsible for:

Please complete this chart of *Important Contacts* for your position:

Name/Position	Phone Number	Email	Why this person is an important contact:

Please list 3 successes/accomplishments that you achieved in your position:

- 1.
- 2.
- 3.

Please list 3 important pieces of advice for the incoming officer:

- 1.
- 2.
- 3.

Please list any outstanding issues/unfinished business that a new officer will encounter when taking office:

Please complete & make 3 copies. Keep 1 copy for your records; review 1 copy with the incoming officer, share 1 copy with the president.

Please compile & attach the following additional documents: program materials & evaluations, record of budget/monies spent, calendar documents, meeting notes, specific officer materials (checkbook, constitution, committee notes, etc.)

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SAMPLE PROGRAM  
Event Summary

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Event Date:

Event Time:

Location:

Event Overview:

Event Goals:

Event Details

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Budget

Item	Cost
<b>Total</b>	

Marketing/Promotion

Key Contacts

Notes for Future Programs

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- What went well?
  
- What would you do differently next time?
  
- Did you meet your goals?
  
- Please provide a "To Do" list for future planning:



# CHARTING YOUR SUCCESS

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**Instructions:** Please complete the chart below by diagramming your activity over the course of an academic year. Please be sure to highlight times of intense activity, planning and stress. Likewise, please be sure to note any times when the organization is not busy with events or activities.

HIGH  
Level of Activity  
LOW

Aug. Sep. Oct. Nov. Dec. Jan. Feb. Mar. April May June July