

OFFICER TRANSITION CHECKLIST

The following is a condensed checklist of tasks, in chronological order, out-going and newly-elected officers should complete. Depending on national, organizational, or campus policies governing your position and duties, some tasks may need to be completed at a specific time or by a specific date.

OUT-GOING OFFICERS

Before the Election . . .

- _ update activity and project reports
- _ update officer manual
- _ update inventory of records and supplies
- _ complete organizational assessment
- _ complete position assessment

Within One Week After the Election...

- _ assist new officer(s) with announcement
- _ assist new officer(s) with pertinent forms
- _ assist new officer(s) with financial forms
- _ transfer records and supplies

Within Two Weeks After the Election . . .

- _ attend officer installation ceremony

Within One Month After the Election . . .

- _ assist with officer training session
- _ assist in goal-setting

Within Three Months After the Election . . .

- _ assist new officer review personal goals

NEWLY-ELECTED OFFICERS

Before the Election . . .

- _ review role/responsibilities of position
- _ discuss position with current officer

Within One Week After the Election...

- _ announce change of officers
- _ complete necessary forms
- _ change names on financial accounts
- _ obtain updated officer manual
- _ obtain records and supplies

Within Two Weeks After the Election . . .

- _ officer installation ceremony
- _ meet with other new officers (as a group)
- _ review responsibilities of position again
- _ review activity, budget and project reports

Within One Month After the Election . . .

- _ officer training session
- _ establish goals
- _ meet with appropriate Service Executive

Within Three Months After the Election . . .

- _ review personal and organizational goals

Transition Packet

- **Officer's Evaluation** (done by each office holder) Ideally this should be completed annually. It provides advice to one's successor and future office holders. At minimum it should contain the evaluation of the current year's programming (or other operations related to position) and notes on what worked well and what didn't.

- **Roster**

- Leadership roster
- Membership roster

- **Notes on Specific Events/Functions**

Establish three one hour meetings

Meeting 1

It is critical that outgoing officers be provided with an opportunity to impart their wisdom and experiences to incoming officers. This meeting will provide the opportunity for incoming and outgoing officers to meet and discuss position specific information. Officer notebooks as well as essential materials should be transferred during this time. Sample dialogue for meeting:

What was the outgoing officer's transition like when they took office?

What information did the outgoing officer wish he knew when he took office?

How could the outgoing officer have been better prepared?

Where did the officer succeed in his position?

What were the greatest mistakes and lessons learned during the officer's term?

What paperwork is required of the specific officer.

What supplies are necessary for the officer to succeed in his position?

What items/programs/projects are still outstanding?

What role did the outgoing officer play in the chapter's leadership?

What key relationships did the officer build? Which relationships still need to be built?

Meeting 2

The second part of the officer transition will provide an opportunity for the outgoing executive board to share information about their term in office. In particular, this portion of the officer transition will focus on how the executive board functioned as a team. Sample dialogue for meeting:

What are the current issues facing the executive board?

What projects or goals have not been fulfilled? What is the status of these projects or goals and what are the next steps for fulfilling them?

How did the executive board function as a team? What specific best practices or approaches allowed the executive board to function at their best?

Meeting 3

New officers meet and decide on three goals to accomplish first year.

Outgoing Officer (s) To Do List

1. Organize all notebooks and files
2. Finish all necessary correspondence (letters, e-mail, phone calls)
3. Prepare year-end report and evaluation
4. Develop action plan and time-line for new officer transition
5. One on one meetings and training
6. Financial Information
7. Leadership training