Officer Transition Checklist

This checklist contains all of the items that each new officer needs to have in their possession when they enter new positions. This list can be expanded to include items for individual chapters who may pass on more information. The material below can be kept in binders, Google Drive, LUCentral, or something similar. Make sure that all of the information is organized and labelled for the incoming officer.

**Officer Materials**
- Description of the position
- Description of all other positions
- Goals and objectives from previous years
- Records and current budget for the position
- Reports of current projects and evaluations of past projects
- Current copies of constitution, by-laws, chapter policies, and procedures
- Current copies of Governing Council constitution, by-laws, policies and procedures
- National Headquarters Guidelines that are related to position
- Past advertisements for events related to the position
- Minute-by-Minute detailed reports of significant events
- Historical files
- Calendar of important dates
- Month by Month calendar of the position
- Meeting minutes from the past year
- University Policies
- Important handouts

**Contact Information**
- National Headquarters Staff
- Regional Staff
- All advisors including Alumni Advisor and Faculty/Staff Advisors
- Outgoing and Incoming Executive Board members
- Committee member contact information
- Entire chapter roster and contact information
- Governing Council contact information
- University Staff & Resources contact information
- Loyola Sorority & Fraternity Life Staff contact information
- Past Vendors
- Past Individuals/Volunteers in the community the chapter worked with.
Officer Transition: Outgoing Officer Survey

Name: ___________________________ Phone Number: ____________________________

Position: ________________________________________________________________

1. What were some responsibilities of yours that are not outlined in the bylaws?
   ________________________________________________________________
   ________________________________________________________________

2. What events or programs should be continued to be implemented in the position?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

3. What resources helped you most in your position?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

4. What was the largest challenge of the position you faced during your term?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

5. What did you do/are doing to manage the issue?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

6. What is one thing you wish you could have improved upon during your time in the position?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

7. List three important pieces of advice you would like to give the incoming officer?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

8. List anything else you deem important for this position.
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
Officer Transition: Incoming Officer Survey

Name: ______________________________ Phone Number: ______________________________

Position: __________________________________________________________

1. Why did you run for this position?
________________________________________________________________________
________________________________________________________________________

2. List any ideas that you have for this position.
________________________________________________________________________
________________________________________________________________________

3. What are you looking forward to the most in your new position?
________________________________________________________________________
________________________________________________________________________

4. What do you think will be your biggest challenge with this position?
________________________________________________________________________
________________________________________________________________________

5. List one goal for this position you would like to complete before the end of your term.
________________________________________________________________________
________________________________________________________________________

6. List any additional items you would like to discuss with the outgoing officer.
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Officer Transition Meeting Design Possibilities

**Group Meetings**
One large group meeting is organized that includes all incoming officers and all outgoing officers. This can take the place of an executive board meeting. Each new officer meets with the previous officer to discuss important aspects of the position. This design will last about one hour and the new officers get to see each other. The problem with this design is there is not much interaction between the different officers. Take this time to do a transition. If you want to do both it will need to take more than an hour.

**Individual Meetings**
Small meetings between the incoming and outgoing officer of the position. These meetings can run any length of time depending on the responsibilities of the officer. These individual meetings are excellent for positions who have a lot of responsibilities, such as President. This gives the outgoing officer plenty of time to show the incoming officer all of the documents they need to submit for National Headquarters and Loyola’s Student Activities and Greek Affairs. A challenge with these meetings is that the new officers do not get to interact with one another. If this design is chosen, it is suggested that there is another meeting held for all incoming officers.

**Workshop and Retreats**
These meetings are hours to a day long retreats with the incoming and outgoing officers. These events can be a bonding moment between the incoming and outgoing officers, as well as a way for incoming officers to bond. Plan meals and breaks to keep the event fun. Make sure there is plenty of time for discussion between the incoming and outgoing officer for each position.

*If the outgoing officer for a position is not able to hold a meeting with the incoming officer of the position, it is the responsibility of the outgoing **AND** incoming President to work with this officer to make sure they get any information that they may need. The President must procure the materials and information before the incoming officer will be able to start on their responsibilities in the position.*
Agenda for Officer Transition Meeting

Here is a possibility of an agenda for a group meeting. This agenda can be changed and reformatted for your needs.

1. **Opening Statement**: Opening statement from the outgoing President should contain information and a schedule of exactly what will be happening at the meeting. Thank everyone for attending.

2. **Ice Breaker**: Schedule an ice breaker that would have the incoming and outgoing officers for each positions work with one another. This will help loosen everyone up and get the energy going.

3. **Position Survey**: If the incoming and outgoing officers have not already filled out their evaluation forms, have them take this time to complete the survey.

4. **Small Groups**: Have the outgoing and incoming officer of each position sit down together and go over the details of being in this position.

5. **Break**: Take a break and let everyone stretch. This would also be a good time to have lunch/snack and let the officers mingle.

6. **Large Group**: Move everyone into a round table discussion. This will be so the outgoing officers can give the incoming officers advice on how to handle conflict within the chapter, problems that have arose in the past, positive stories about their jobs, and other important topics for the executive board to learn. It is important for incoming officers to understand the complexities of the position, but they must also leave the meeting energized to begin the work.

7. **Incoming Officer Group**: The outgoing officers are able to leave at this point and thank them for attending. The incoming President will lead this part of the meeting. This is for the incoming officers to work together to come up with ideas, expectations of each other and the executive board, and set goals for the term. Also, add a discussion about the budget and begin with what the budget is going to look like for the next term. Discuss the major takeaways from the individual transition meetings.

8. **Closing Statements**: The incoming president should thank the incoming officers for attending the meeting. Leave the meeting on a good note. Give the incoming officers words of encouragement to carry them through the next term.