

Officer Transition Checklist

This worksheet should be completed by all outgoing officers prior to their transition session with incoming officers.

Purpose: to assist in officer transitions by focusing on accomplishments and to provide a critique of your year in office. This report should serve your successor as a supplementary resource in planning for his term.

	Office:		
	Name:		
	Date:		
1.	List other o	ficers / chairmen with whom you worked, and the projects involved.	
2.	List specific	successes realized during your term in office and the reasons for their success	SS.
3	list any nro	plems or disappointments you encountered as part of your office and suggest	wave of
υ.		correcting them.	ways or



4.	List additional materials and sources of information you found most helpful. Include the phone numbers for alumni and faculty advisors, alumni, university / college faculty and staff, and community resources you worked with or sought assistance from during your term.
5.	Explain the timetable of activities for your office. Detail what events and activities take place each month. Describe when planning and key steps for preparing each should take place (how long and at what times during the year). Give suggestions for increasing efficiency and effectiveness.
6.	List any other suggestions you feel would be helpful to your successor in carrying out the expectations of this office.



One-on-One Transition Meeting

Take time to go through the information below when you sit down with the incoming officer for your position.

Pa	art 1 - Officer Notebook and Expectations				
	Give your cleaned out, organized officer notebook to the new officer and explain its contents.				
	Review the <u>Sigma Nu Officer Resources page</u> for the position and download the most up-to-date co of the officer manual for this position (<u>http://www.sigmanu.org/officerresources</u>).				
	Explain the expectations of the office.				
	plain the expectations that go along with the office that are not in the officer's description.				
	eview the past year's calendar and explain the programs and events that took place.				
	Show the officer the chapter bylaws, pointing out any specifics related to this role. Recommend they be read in full following the meeting.				
	Explain the forms and files that have been started over the past year.				
	Review the budget for the office (if you don't have one, ask the Treasurer to help you come up with one).				
	Review the list of contacts pertinent to your office (names, email addresses, and phone numbers).				
	eview the contact information for your alumni and faculty advisor(s) and how to best utilize them.				
	Check the supplies and materials that are necessary for this office. Explain to the officer how to get additional supplies.				
	Together, brainstorm some ideas for the office.				
	Discuss the timeline and deadlines that are associated with this office. Discuss the importance of meeting the deadlines for forms and other paperwork.				
Pa	art 2 - Goals and Follow Up				
fol	ce you have covered the Officer Notebook and related materials as outlined above in Part 1, cover the lowing items. For this part of your meeting, review the goals you had as an outgoing officer for the mester / year.				
	Explain the status of these goals.				
	Explain which goals were completed.				
	Explain which goals need follow-up.				
	Now, help the incoming officer think of some goals he might set for the next semester/year.				
	Set a time to meet again during the incoming officers' first month in office.				
	Fallow Un Monting, Date				
	Follow Up Meeting: DateTimeLocation				

 \square Answer any questions the new officer has for you.