TIPS FOR OFFICER TRANSITION

A chapter's strength depends on a reliance on repetition of a system that works. The only way to ensure that a proven system can stay consistent is to work to provide for smooth officer transitions. Chapters that develop a system that is replicable no matter who makes up the leadership are assured success over time.

TIPS FOR OFFICER TRANSITION

- Chapter should have an Officer Transition Retreat where each outgoing officer meets with the incoming officer. A sample retreat is available as an online resource under "Officer Transition Retreat – Sample Agenda and Curriculum."

- Outgoing officer should bring his officer binder with all officer resource materials to the meeting to transfer to the incoming officer; this should include the "Officer Position Description" document.

- Follow the "Officer Position Description" document line by line, and the outgoing officer should ask periodically if the incoming officer has questions throughout.

- Go through all documents in the officer binder and explain general procedures that are followed. Documents should include previous event guidelines, budget information, last four (4) officers' information, important dates and deadlines, unfinished projects, important people to know, what were successes, failures, etc.

- The outgoing officer should make sure to formally transfer all rights and privileges to the incoming officer
    - □ Signing rights for banking accounts
    - □ University officials should be made aware of transition formally
        - Fraternity/Sorority Life
        - Student Activities Office
        - Dean's Office (if applicable)
        - University and local police/fire/emergency

- Make sure that all incoming officers are formally reported to Fraternity Staff via Vault.

- All outgoing officers should be readily available throughout the rest of the term (and possibly into the next within reason) to help the incoming officer as questions may arise.
    - □ Outgoing officers should never expect that one meeting with the incoming officer will result in a seamless transition.