



Officer Transitions

The continued success of your Chapter is dependent upon having solid transitions from one Officer to the next in which all relevant information is shared. A structured four week transition will ensure that each Officer has the tools to succeed in their role.

Prior to Transitions

Organize Transition Documents: Officers should keep organized records and add to them throughout the term. While some Chapters use physical binders, the use of electronic documents is strongly encouraged to prevent the loss of important information and facilitate easy access.

Week 1

Meet One on One: Following elections, outgoing and incoming Officers should meet to discuss position responsibilities and review transition documents. The incoming Officer should prepare questions for the next meeting.

Open Meetings: Exec Board Meetings should be opened up so that newly elected Officers can observe how the meetings are run.

Week 2

Meet One on One: The outgoing Officer should answer questions from the incoming Officer regarding the position or documents. The outgoing Officer should review the logistics of the tasks for which the Officer is typically responsible (updating spreadsheets, reserving rooms, etc.).

Open Meetings: During Exec Board Meetings, the outgoing and incoming Officers should sit together and co-present information.

Update Access/Authority: Changes should be made to ensure that the incoming Officer has access to accounts, forms, etc. as required.

Week 3

Meet One on One: The outgoing Officer should supervise as the incoming Officer completes tasks, answering questions that arise along the way. Their role in the Chapter Meeting should be discussed.

Chapter Meetings: The outgoing and incoming Officers should sit together and co-present information to the Chapter.

Week 4

Exec Board and Chapter Meetings: The incoming Officer should be presenting at meetings and have a firm grasp of their other responsibilities.

Officer Installation Ceremony: At the conclusion of the four week transition, the outgoing Officer should officially pass their duties on to the incoming Officer.

Transition documents should include:

- Position description per Chapter and National documents
- Logins and passwords for all accounts
- Information regarding progress toward goals and long-term plans
- Details about specific events, including what worked well and what should be improved
- Tips and tricks learned during the past year