

President Training Worksheet

Use the checklist and worksheet provided to make the transition of the President position from the outgoing to the incoming Officer smooth. Take notes as needed during the process.

☐ Review:

- ☐ [President Training Guide](#)

This is an overview of the responsibilities and tools for the position

- ☐ [Chapter Meeting Prep Kit](#)

- ☐ [Due Dates](#)

- ☐ Risk Management Programming available through the sheltering institution or other entity

Who to contact, when to contact and how to set-up programming

- ☐ Any additional local resources needed for the position

- ☐ National Office's [Chapter Admin Portal](#) and [how to update the Member Roster](#)

☐ Share resources:

- ☐ [National](#) & Chapter Policies

- ☐ [Risk Management Programming](#) from the Phi Sigma Pi National Office

- ☐ Contact Information for people related to the position

- ☐ Faculty Advisor, University Support

- ☐ Operations Advisor, Phi Sigma Pi Chapter Excellence Board

- ☐ Leadership Development Coordinator, Phi Sigma Pi National Staff

- ☐ Business Manager, National Staff

- ☐ Chapter Account Usernames & Passwords related to the position (*Ex. where the previous meeting minutes are kept, social media accounts, online bank account*)

☐ Task:

- ☐ Switch over access to the bank account at the bank, if second signer

- ☐ Additional talking points related to the position