Officer Transition Worksheet

Outgoing Chapter Officers

Outgoing officers are integral to a successful officer transition. Each outgoing officer should take time to prepare their materials to maximize the effectiveness and efficiency of the time spent with the incoming officer.

Outgoing Officer Evaluation

As an executive board, have we developed our members in a way that is consistent with the vision of the fraternity? Describe the efforts of the executive council.

Which of the programs we provided were our most successful? What contributed to that success?

What was our greatest achievement as an executive council?

Do we have any goals left unaccomplished? If so, why? What prevented us from achieving our goal?
End of Term Report
This report will provide the incoming officer a more intimate look at the position. It also provides you as the outgoing officer the opportunity to provide suggestions to improve the position within the chapter.

Projects and Goals: List your projects and goals for your term in office. Did you accomplish the goal? Who else worked with you on each project or goal? What made the project or goal successful?

Concerns: Did you encounter any problems or disappointments during your term of office? Provide ways of avoiding or correcting them.

Supplemental materials: What other information should be passed along to your successor? Include campus contacts, ongoing contracts, community resources, etc.

Timeline: Provide your weekly or monthly calendar. How can this calendar be improved for efficiency and effectiveness?
**Other:** How else can your successor carry out the responsibilities of this office?

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**Document Sharing**

Be sure to pass on a binder or online repository (such as HQdocs, Dropbox or Google Drive) containing all the documents used throughout your term of office. At minimum it should include the items listed in your position checklist. This will ensure knowledge or resources that will be helpful to the next officer is not lost over time.

Additional items you may want to consider including are:

- Vision and core values of AKPsi
- Job descriptions of officers
- Description of committees
- Organization membership list
- Historical records of organization
- Meeting minutes and agendas
- Listing of basic annual procedures (registration process, room reservations, etc.)
- Calendar of past year with annual events
- Financial records
- Resource or contact list of important people
- Recommendations for the upcoming year
Incoming Chapter Officers

Incoming officers are integral to a successful officer transition. Each incoming officer should take time to prepare their materials to maximize the effectiveness and efficiency of the time spent with the outgoing officer.

As incoming officers, you should seriously consider your desire to assist the members of the chapter. Remember, Alpha Kappa Psi’s vision is to be recognized as the premiere developer of principled business leaders. How will you support this vision? How does your position support this vision?

Preparing for the Transition Meeting

As a new officer, you should spend time considering your actions throughout your term in office. Be sure to review the available resources to be knowledge about your position prior to your transition meeting. Remember, everything the outgoing officer is going to share with you is new information. Be prepared to take notes!

Incoming Officer Handout

This will provide you with a roadmap for your term in office. Be sure to spend some time thinking about each level of your position. Your responses to these questions also provide you the opportunity to enhance and build upon the accomplishments of your predecessor.

What is the purpose of my office?

What are my responsibilities?
Using the ideas you listed above, create your goals for the position. Be sure to utilize the **SMART goal** method.

(Fill this in during your 1:1 transition) Does the outgoing officer have any thoughts or suggestions to improve your goal?

What are the first five things I should accomplish? How will I accomplish them?

Complete this sentence: At the end of my term in office, I want to be sure members...