

Chapter Officer Transition Guide

Panhellenic Association

Purpose

A smooth officer transition is essential to the long-term success of your chapter. Effective transitions preserve knowledge, ensure continuity, and set up new leaders to build on past progress. This guide provides steps, questions, and resources to support both outgoing and incoming officers during the transition process.

Outgoing Officers' Responsibilities

Outgoing officers are expected to prepare, document, and share key information to help their successors succeed.

1. Review and Reflect

- Chapter history: key successes, challenges, strengths, and growth areas.
- University and SFL policies and procedures (see Community Standards on the SFL website; consult with your SFL Chapter Support Liaison).
- Chapter constitution, bylaws, mission, and officer responsibilities (note any updates needed).
- Your officer job description and expectations, share lessons learned, including advice on challenges and successes.

2. Organize and Transfer Records

- Meeting agendas, minutes, binders, files, notebooks.
- Digital documents, emails, promotional materials, event evaluations, and reports.
- Chapter budget, financial records, outstanding bills, and event evaluations.
- Contact lists: chapter roster, alumni updates, council officers, SFL staff, chapter advisor(s), house director, and headquarters staff.
- Accounts and materials: email/social media logins, bank accounts, contracts, and passwords.

3. Support Your Successor

- Share the chapter calendar of events and key deadlines (SFL, council, headquarters, and chapter-specific).
- Meet with incoming officers to plan their first steps.
- Introduce successors to advisors, SFL staff, council officers, and headquarters staff.
- Review and complete Community Standards together.

Incoming Officers' First Tasks

1. Get Organized

- Create a master calendar with chapter meetings, programs, and events.
 - Add all SFL programs, governing council meetings/events, and university deadlines.
- Establish meeting agendas, times, and locations.
- Update the chapter webpage and social media with new officer information.
 - Reach out to your council to get chapter specific information on the council website updated (if applicable).
- Update chapter Rock Chalk Central page with accurate contacts.

2. Review and Reflect

- Meet outgoing officers to review last year's goals, achievements, challenges, and unfinished projects.
- Review governing council (IFC, MGC, NPHC, PHA) bylaws, requirements, and important documents.

3. Set Goals and Priorities

- Establish new chapter goals and prioritize initiatives for the year.
- Schedule a chapter-wide goal-setting session early in your term.

4. Build Connections and Use Resources

- Connect with governing council executive officers and SFL staff.
 - Connect with your chapter support liaison.
- Gather key council meeting dates, requirements, and event details.
- Learn and utilize Sorority & Fraternity Life resources.

5. Maintain Records

- Keep organized, detailed records throughout your term to support future officer transitions.

SFL Expectations

1. Organization re-registration opens in July.
 - a. Make sure new president is added on Rock Chalk Central (RCC)
2. Join the All-Presidents GroupMe
3. Connect with SFL Liaison to get set up with chapter support meetings.

Council Expectations

1. Panhellenic Association Expectations of Chapter Presidents:
 - a. Join the Presidents GroupMe, Geneva, Discord, etc.
 - b. Add any required events, roundtables, meetings, etc. To your calendar that have been scheduled.
 - c. Council dues