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**OFFICER TRANSITION GUIDE**

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| POSITION: |  |  |  | DATE: |  |

Instructions:

Work together as incoming and outgoing officers for the same position to complete the following assessments of the accomplishments, goals and operations of your organization for the previous term of office with the upcoming term of office in mind.

Some sections refer to the organization, where others refer to the executive officers and/or chair positions. The final section refers to your specific officer/chair position.

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| ASSESS YOUR ORGANIZATION OVER THE COURSE OF THE PAST YEAR IN THE FOLLOWING CORE VALUES OF THE CENTER FOR FRATERNAL VALUES AND LEADERSHIP: | |
| **BROTHERHOOD/SISTERHOOD** | **SCHOLARSHIP** |
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| **LEADERSHIP** | **SERVICE & PHILANTHROPY** |
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| **DIVERSITY & INCLUSION** | **STRENGTHS/ AREAS OF OPPORTUNITY** |
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| GOALS FOR your specific organization | |
| GOALS THE ORGANIZATION ACCOMPLISHED DURING THE YEAR: | GOALS THE ORGANIZATION SHOULD WORK ON NEXT TERM: |
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| ASSESS YOUR EXECUTIVE BOARD/CHAIR POSITIONS PERFORMANCE IN THE FOLLOWING AREAS: | |
| **operations** | **communication** |
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| **pr (campus, council, Greek community, morgantown)** | **programming (fun, educational, service, balanced calendar)** |
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| **STRENGTHS** | **AREAS OF OPPORTUNITY** |
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**ASSESS YOUR POSITION:**

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| What does your position entail? | WHAT ELSE DO YOU THINK IS MISSING FROM YOUR POSITION DUTIES? |
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| **STRENGTHS** | **AREAS OF OPPORTUNITY** |
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| Goals for your position – do your officer goals help with YOUR ORGANIZATIONAL goals? | |
| GOALS THE OUTGOING OFFICER ACCOMPLISHED DURING THE YEAR: | GOALS YOU THINK THE INCOMING OFFICER SHOULD WORK ON DURING HIS OR HER TERM: |
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| NEXT STEPS – WHAT SPECIFIC ACTION IS NEEDED TO COMPLETE THE TRANSITION? | |
| THE OUTGOING OFFICER/CHAIR WILL | THE INCOMING OFFICER/CHAIR WILL |
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DEADLINE FOR ACTION STEPS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**BE SURE TO REVIEW AND SHARE THE FOLLOWING DOCUMENTS/INFORMATION!**

* A copy of the organization’s constitution, bylaws, chapter policies and procedures
* Officer job description as detailed in the organization’s bylaws
* Goals and objectives from last year
* Status of ongoing projects
* Previous meeting minutes and officer reports
* Financial records or budget relating to the position
* Center for Fraternal Values and Leadership Policies & Procedures Manual
* Contact information for:
  + Inter/National Headquarters
  + Chapter/Graduate Advisor
  + Other Advisors
  + House Corporation (if applicable)
  + Center for Fraternal Values and Leadership Staff
  + Emergency Contact Information (police, fire, Carruth Center)
* Governing Council Information
* Historical files
* Calendar with critical dates (anniversaries, holiday observance, etc.)
* Change officer position on WVU Engage