

Officer Transition Report Template

Chancellor



This template is designed to facilitate conversation between the outgoing Chapter Officer and the incoming, newly elected Officer. This document will not cover all necessary topics that a transition meeting requires, but can be used to prompt conversations

Name of officer filling this document out:

Chapter:

Date of transition meeting:

Are you elected to this role for one term or one year?

How many ritual books does the Chapter currently have?

What are some notes that the new officer should be aware of?

- *How do you run Chapter Meetings?*
- *What is one thing the outgoing officer wanted to do with their role but wasn't able to?*
- *What is the Individual Discipline Policy and how do I complete the training?*

What is your plan for running Chapter Meetings?

Do you currently utilize meeting slides for Chapter and Executive Committee meetings? Yes No

If yes, where are they located?

Where are the current Chapter's Bylaws and Policies saved?

How often are they reviewed/updated?

How many members have completed the Standards

Training?List their names here:

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How often does the Chapter Standards Committee meet?

What are your goals for your term as Chapter Chancellor?

What is one thing you want to improve within your Chapter and its current ritual and standards practices?

Jot down some topics/ideas you want to bring up at the next Executive Committee meeting: