



DELTA CHI

ONE-ON-ONE OFFICER TRANSITION BRIEF

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One-on-One

Officer Transition Meetings

Think of this meeting like passing the torch: when one leader hands responsibility to the next, the knowledge and relationships that transfer with it determine whether the flame stays strong or dies out. Your officer transition works the same way; both of you working together ensures the chapter continues moving forward. This guide will help you have a productive conversation that sets everyone up for success.

PURPOSE OF THIS MEETING

The objective is for the outgoing officer to share what they've learned and for the incoming officer to understand what it really takes to succeed in this role.

KEY OBJECTIVES

1. Understand what the position actually involves (beyond written descriptions).
2. Transfer relationship and institutional knowledge that took months to build.
3. Share what worked, what didn't, and why.
4. Connect the role to chapter priorities and needs.
5. Prepare the incoming officer for effective goal-setting at Regional Leadership Academy (RLA).

BEFORE YOU MEET

OUTGOING OFFICER

- Complete Outgoing Officer Transition Worksheet
- Gather all transition documents and resources
- Review IHQ materials relevant to the position

INCOMING OFFICER

- Complete Incoming Officer Transition Worksheet
- Review position description and chapter bylaws
- Access and review relevant IHQ documents

MEETING AGENDA

GET ON THE SAME PAGE (20 MINUTES)

- Walk through what the job actually looks like day-to-day.
- Compare what the incoming officer expects vs. what really happens.
- Talk about how this position impacts recruitment, alumni relations, member experience, and operations - maybe tie in reflections from the incoming officer's prep.
- Clear up any misconceptions before they become problems.

SHARE THE REAL KNOWLEDGE (30 MINUTES)

- Using what the outgoing officer put together:
- Go through the chapter assessment and leadership insights.
- Review the contact list and who matters.
- Share what resources are worth your time and which ones aren't.
- Be honest about opportunities and challenges ahead.

HANDLE LOGISTICS (20 MINUTES)

- Transfer documents, credentials, and system access (does the position have a Google drive? How do you share information?).
- Hand off ongoing projects and explain what needs to happen next.
- Introduce key contacts and explain how to work with them effectively.
- Review processes that aren't documented but are essential.

WRAP UP AND PLAN AHEAD (15 MINUTES)

- Address the incoming officer's questions from their worksheet.
- Share mistakes to avoid and lessons learned through experience.
- Identify immediate next steps before RLA.
- Establish how you'll stay in touch for ongoing questions.

WHAT TO FOCUS ON

OUTGOING OFFICER: COME READY TO...

- Be honest about what worked and what didn't.
- Explain the relationship dynamics that aren't written anywhere.
- Share the constraints and opportunities that will actually impact success.
- Give practical advice based on your real experience.
- Address the challenges directly.

INCOMING OFFICER: COME READY TO...

- Share how you approach leadership and working with people.
- Ask the specific questions you prepared.
- Talk through how you see the role fitting into chapter priorities.
- Be honest about what you're worried about or confused by.
- Confirm what you need to do next.

AFTER YOU MEET

- Make sure contact info is exchanged for future questions.
- Confirm all the access transfers and handoffs actually happened.
- Plan to reconnect after RLA to talk about how goal-setting went.
- Start working on the immediate priorities you identified.

BOTTOM LINE

This isn't just a formality - it's your opportunity to set each other up for success. The outgoing officer's honest insights plus the incoming officer's preparation creates a smooth transition that benefits the entire chapter.

Outgoing Officer Transition Preparation Guide and Worksheet

PREPARING FOR LEADERSHIP TRANSITION

Your experience as an officer contains valuable insights that can significantly impact your successor's effectiveness. This worksheet helps you organize your knowledge, document key processes, and identify the relationships and resources that will be most valuable to the incoming officer.

ESSENTIAL RESOURCES AND DOCUMENTATION

Effective transition involves transferring both information and context. Prepare these resources with notes about their practical importance:

CORE DOCUMENTS

- Chapter Bylaws (highlight the sections you referenced most frequently)
- Officer Position Description (from Chapter Leader tab on Delta Chi website)
- Policies and Procedures (identify which ones actually impact daily operations)
- IHQ Briefs (include your notes on implementation and results)

OPERATIONAL RESOURCES

- Meeting notes and agenda templates that proved effective
- Contact information with relationship context and communication preferences
- Project files and templates you developed or refined
- Examples of successful communications and messaging
- Budget management approaches and tracking tools you found useful

Consider including brief explanations of why each resource proved valuable and how you used it most effectively.

PERSONAL EXPERIENCE ANALYSIS

Effective leadership transition requires candid reflection on both successes and challenges. Your honest assessment of the role's demands, rewards, and obstacles will provide your successor with realistic expectations and actionable insights. Take time to thoughtfully consider these questions, as your responses will help shape their approach to the position.

ROLE EXPERIENCE AND DECISION-MAKING

What aspects of this role brought you the most satisfaction and energy?	
What moments or achievements made you feel most proud as a leader?	

When you made impactful decisions, what factors contributed to their success?	
What strengths did you discover about yourself in this position?	
What insights about leadership would you want to share with someone starting this role?	

RESOURCE ASSESSMENT AND SUPPORT SYSTEMS

Identifying the tools, relationships, and information sources that contributed to your success helps your successor build their own effective support network from day one.

Which people became your most trusted advisors and collaborators?	
What resources consistently helped you achieve your goals?	
Which university departments or staff members were most supportive?	
What alumni or faculty members provided the most valuable mentorship?	
Which tools, systems, or external resources enhanced your effectiveness?	

ORGANIZATIONAL ASSESSMENT AND STRATEGIC INSIGHTS

Your observations about chapter operations, leadership dynamics, and organizational effectiveness represent crucial institutional knowledge. This assessment helps identify strengths to build upon and challenges that require attention, providing your successor with a foundation for strategic decision-making.

LEADERSHIP STRUCTURE AND COMMUNICATION

How clearly defined are the boundaries between officer roles?	
What would you change about this position's scope or responsibilities?	
Which communication channels actually got results?	
What communication methods fell flat or caused confusion?	
How could the executive team coordinate more effectively?	

OPERATIONS AND MEETING CULTURE

What made executive board meetings productive versus frustrating?	
How well did committee structures serve the chapter's needs?	

Where did you see the team click, and where did friction occur?	
Which operational processes worked most effectively and could serve as models for best practices?	

RESOURCES AND FINANCIAL REALITY

Was your budget realistic for what you wanted to accomplish?	
What financial constraints or opportunities should your successor know about?	
Which non-financial resources (space, technology, partnerships) were most valuable?	
What resource challenges blindsided you that your successor should anticipate?	

PROGRAMMING AND MEMBER ENGAGEMENT

Which programs or events connected best with members?	
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How well did your activities align with the stated chapter goals?	
What initiatives should definitely continue?	
What initiatives should be discontinued or completely reimaged?	
What programming gaps did you notice but couldn't address?	

YOUR PERSONAL DEVELOPMENT

How has this role changed you as a leader?	
What skills did you develop that you didn't expect?	
What development opportunities would you recommend?	
What capabilities are absolutely essential for success in this role?	

GOALS AND VISION

What accomplishment from your term makes you most proud?	
Which of your initiatives have momentum and should continue?	
What goals need a fresh approach or different strategy?	
What did you envision but never get the chance to execute?	
How does this position's success connect to the chapter's bigger picture?	

ADVISOR RELATIONSHIPS

Is the current level of advisor involvement helpful or limiting?	
How can your successor build stronger advisor connections?	
Where are there untapped opportunities for advisor collaboration?	
Which advisor relationships are most critical to maintain?	

STRATEGIC RELATIONSHIP MANAGEMENT

Successful leadership depends significantly on effective relationship management. Rather than simply transferring contact information, this section helps you document the nuances of key relationships, communication preferences, and collaborative dynamics that will enable your successor to maintain and strengthen these important connections.

[illegible]

Name and Title	Phone Number & Email	How does this person support you?

KEY CATEGORIES TO INCLUDE:

- **University Partners**
 - Administrators who approve events or policies
 - Facility coordinators for your regular venues
 - Student life staff who support Greek organizations
 - Academic advisors or faculty allies
- **External Relationships**
 - Vendors you trust for events, food, or services
 - Community partners for service or programming
 - Other fraternity/sorority leaders you collaborate with
 - Local business owners who support your chapter
- **Delta Chi Network**
 - Alumni who actively support the chapter
 - National headquarters contacts for specific issues
 - Regional leadership team members
 - Officers from other chapters you've connected with

Incoming Officer Transition Preparation Guide and Worksheet

Complete this worksheet before your one-on-one transition meeting with your predecessor. This preparation will help you have a more focused conversation and allow you both to see how your understanding aligns with their experience. Your thoughtful preparation will make the transition meeting more valuable for both of you.

ESSENTIAL INFORMATION GATHERING

Start with the basics. Identifying what you don't know helps you ask the right questions during your transition meeting.

FOUR THINGS ABOUT MY POSITION I NEED TO KNOW:

THREE PEOPLE/POSITIONS I SHOULD CONNECT WITH:

TWO SKILLS I NEED TO DEVELOP/STRENGTHEN:

ONE GOAL I HAVE FOR MY TIME IN THIS POSITION:

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PRIORITY AREAS FOR RLA PREPARATION

Understanding how your position fits into these strategic areas will help you contribute meaningfully to goal-setting at RLA. Think about your role's connection to each area before discussing it with your predecessor. Your position contributes to chapter success in four key areas. Understanding these, along with any priorities, specific to your chapter, will help you ask better questions and prepare for goal-setting at RLA:

RECRUITMENT AND GROWTH

How does my position impact recruitment or retention?	
What do potential new members first notice about the areas I'll oversee?	
How might my work influence whether current members stay engaged or drift away?	

ALUMNI ENGAGEMENT

What alumni connections are relevant to my role?	
What expertise do alumni have that could make my position more effective?	
How could my work create opportunities for alumni to meaningfully contribute?	

MEMBER EXPERIENCE

What aspects of member experience do I influence?	
What do members provide feedback about that falls under my responsibilities?	
How do the programs or services I'll manage affect member satisfaction day-to-day?	

OPERATIONS

What systems, processes, or logistics do I directly manage or influence?	
What operational metrics or outcomes should I track to measure success?	
How do I ensure smooth coordination between different chapter functions and events?	

ADDITIONAL CHAPTER PRIORITIES

What additional priority area is most important to our chapter right now?	
How does our chapter's unique situation create opportunities or challenges for my position?	

QUESTIONS FOR YOUR TRANSITION MEETING

These reflection questions help your predecessor share their most valuable insights. Their honest answers will give you realistic expectations and practical wisdom.

- What decision are you most proud of from your term?
- What would you do differently if you were starting over?
- What surprised you most about this position?
- Who became your most trusted collaborators?
- What resources were most valuable to your success?
- What should I prioritize in my first month?

PERSONAL LEADERSHIP ASSESSMENT

Understanding your own leadership style helps you to communicate effectively with your predecessor and fellow officers. This self-awareness will inform your approach to the role.

MY LEADERSHIP STYLE - THINK ABOUT A LEADER WHO MADE A POSITIVE IMPACT

This might be a coach, teacher, supervisor, family member, former officer, etc.

What did they do that made them effective?	
How did they communicate with people?	
What would you want to emulate from their approach?	
What would you do differently?	

NOW, THINK ABOUT YOURSELF:

When you're in group projects or activities, what role do you naturally take?	
How do you prefer to handle conflict or disagreements?	
What energizes you most when working with others?	

MY EXPECTATIONS:

What initially attracted me to this position?	
What impact do I hope to have?	
What concerns do I have about the role?	