



OFFICER TRANSITION CHECKLIST

A smooth transition is the responsibility of both the outgoing and incoming members of an organization, acts as a means of providing training for new officers, closure for the outgoing leaders, and helps the organization maintain consistency from year to year.

Complete a “Change of Officer Form” with the Office of Campus Activities (OCA).

Forms available in OCA at 215 Creese Student Center

Set up a meeting and/or plan a retreat.

- Don't just drop off a binder and leave a note that says, “Good luck!” Make sure that the outgoing and incoming officers meet together – uninterrupted – for an hour or two (or as long as it takes to answer the questions).
- Retreats are a fun way to train new officers. Retreats held off-campus help facilitate good relationships and are a great way to avoid distractions or disturbances. Topics to consider on a retreat include: goal setting, idea brainstorming, group development, and direction of the organization. Make sure to plan some fun as well!

Share files related to your position and organization.

- What? You don't keep any files? At least make notes on important projects or tasks that were completed.
- Written information is very helpful if the outgoing officer graduates or moves on to a different role on campus.
- Make sure the incoming officer has a copy of the following items:
 - Copy of Constitution and By-laws (*copies available in the Office of Campus Activities if needed*)
 - Position description of officers and members
 - List of committees and their description
 - Member & officer contact list
 - Contact information of important people/offices on campus
 - List of basic annual procedures and/or calendar of annual events
 - Web page and webmaster information. How do you maintain the site?
 - Mission, philosophy, goals and/or purpose statement of organization
 - Financial records
 - Evaluations of previous and current projects
 - Meeting minutes and agendas
 - Any historical records of the organization

Review a calendar of the year.

- Take out a calendar of this school year and review it together. What were the busy times? What kinds of things should the new officer anticipate? You may not remember how crazy it was last fall, but looking at your calendar may jog your memory.

☐ Make introductions to resources.

- Schedule time to walk around campus together so the outgoing officer can make introductions to the important people who can serve as resources to the incoming officers (Creese Student Center staff, Office of Campus Activities, Event Services Office, academic departments, etc.) Make sure new officers meet with the organization advisor as well.

☐ What can the Office of Campus Activities (OCA) do for you?

- Talk together about the ways the organization has used the resources in OCA this year. Some ideas to discuss:
 - SOOT – Student Organization Orientation Trainings for all officers are available throughout the year
 - Activities Unlimited - Student Involvement Fair
 - Staff advisors and Leadership Assistants (LA) to assist groups with any concerns/issues
 - Completing a student organization Registration form each year for your organization
 - Resources such as retreat and program planning, teambuilders, and much more.

☐ Review budgets and funding.

- What is the financial status of the organization?
- Where did the organization get money from this year?
- Did the organization apply for SAFAC (student activity fee) funding and/or receive funding?
- Which fundraisers worked – which didn't?

☐ Review past and future organization events.

- Which events were successful this year? Which should be continued?
- When should the planning start?
- Which events didn't go well? Should they be revamped and tried again or just dropped?
- Were there any pitfalls or things that could have been improved?

☐ Meetings & Organization.

- Where were meetings held? What worked? What didn't?
- Has a summer contact list been created for the organization?
- What is a typical week like?
- What were the most and least challenging parts of responsibilities?

☐ Recruitment activities.

- What recruitment activities were done? What worked? What didn't work?
- Why did new members stick around? If they didn't – what made them leave?
- A great way to recruit new members is at Activities Unlimited during Fall and Spring Term Welcome Back Weeks. Register your organization for this event in the Office of Campus Activities.

☐ Next Step

- Work together to make a list of "things to do" for the incoming officer.
- Which items need their attention now?
- Make this list together so the outgoing officer can help with direction.
- Make sure to trade contact information so that the outgoing officer can be a resource in the year ahead!