

Leadership Transition Checklist

Part 1: Officer Transition- A Checklist for Outgoing Officers

- A. Information About the Organization
 - Review your organization's history
 - Review College Policies and Procedures
 - Review the organization's constitution and/or mission statement
 - Review your goals and objective for the last year
- B. Officer's Roles and Printed Materials
 - Review and pass on records, binders, files, notebooks, and important correspondence
 - Review position descriptions
 - Review agendas, minutes, evaluations for projects and events
 - Review your achievements and failures
 - Pass on membership list
- C. Officer Introductions
 - Introduce officer to key contact people
- D. Advisor
 - Have a final closing meeting with your group's advisor
 - New officer, old officer and advisor meeting

Part II: Officer Transition: A Checklist for New Officers

A. Programming- New Officers

- Update student organization contact information with Office of Student Life/Student Engagement (rerecognition takes place the beginning of each semester, but updated information may be needed before the process)
- Familiarize self with Office of Student Life policies for student organizations
- Understand present and future programs
- Develop a master calendar with meetings, programs, and events
- Establish structure or meeting agendas
- Discuss meeting times (place, time, and advertisement)

B. Goal Setting- New Officers

- Evaluate past year's concerns and achievements
- Evaluate past officer's goals
- Establish new officer's, individual's and board's goals
- Prioritize officer's goals to member's goals
- Plan to present goals to members
- Plan a goal setting meeting/retreat
- Help prioritize organization goals with entire membership

C. Officer Training- Some Helpful Hints for Officers

- Decide when new officers will take over
- Utilize Student Engagement/OSL resources
- Meet with your advisor regularly