Leadership Transition Checklist

PART 1 OFFICER TRANSITION - A CHECKLIST FOR OUTGOING OFFICERS:

This checklist is intended to provide new officers a complete orientation of their duties and responsibilities that is provided by your organization's outgoing officers. Some ideas will pertain to your organizations while other ideas may not be suitable, but some will help all organizations:

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		
В.	OFFICER'S ROLES AND PRINTED MATERIALS:		
	Review and pass on told records, binders, files, notebooks, and important correspondence		
	Review job/officer descriptions		
	Review officer's written expectations		
	Review your organization's agendas and minutes		
	Review your organization's evaluations for projects		
	Review your organization's previous minutes, financial records, mailing lists		
	Review your achievements		
	Review your failures		
	Pass on membership list, contracts, addresses, phone numbers, email addresses, etc.		
	Provide financial information such as treasurer's accounts, fundraising information and copies of		
	completed requisitions.		
C.	OFFICER INTRODUCTIONS:		
	Introduce officer to key contact people – include their telephone number and emails		
	Presiding and function in meetings		
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:

This checklist was designed for new officers to use as they begin their respective officer's roles. This can be used with outgoing officers, or answer questions of new officers, or with new officers after they have met with outgoing officers.

		Re-register organization at the Office of Student Activities, which happens every fall, summer
		contact information - is needed for over the summer
		Understand the registration and recognition processes with the Office of Student Activities and
		Student Government Association
		Understand present and future programs
		Develop a master calendar with meetings, programs, and events
		Make current your organizations website, mailboxes, contact sheets, office space, voicemail, etc.
		Establish structure or meeting agendas
		Discuss meeting times (place, time, and advertisement)
		Officer Board meetings
		Organization meetings
		Advisor meetings
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В.	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.	OFFICE	ER TRAINING – SOME HELPFUL HINTS FOR OFFICERS:
		Decide when new officers will take over
		Utilize the Office of Student Activities Resources
		Meet with your advisor regularly