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

B. 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:

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.

A. PROGRAMMING – NEW 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

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 the Office of Student Activities Resources
_____ Meet with your advisor regularly