Student Organization Officer Transition Checklist

Good officer transitions are important to the continued operation and success of student organizations. It helps minimize confusion, gives outgoing officers a sense of closure, and provides incoming officers a foundation of knowledge.

Student Organizations are listed in one of two registration windows: Autumn or Spring. The Autumn registration window is August 1-October 15. The Spring registration window is February 15- April 30. Student officers will need to renew the registration requirements during their specific registration window. The registration window can be located on the student organization's page listed as "Transition Window". The completion of registration requirements outside of an organization's registration window will only apply to the previous window and not the upcoming window. It is very essential that the outgoing leadership shares this information with the incoming leadership.

First, have a meeting/conversation between incoming and outgoing officers. Face to face time is essential to successful transitions. Discussion items include timelines, people who were resources, things you wish you would have known.

Here is a checklist of items to pass on to the next Primary Leader of your organization:

- ☐ Binders/Folders/CDs/Flashdrives/Notebooks/Emails
- ☐ A complete record of the organization's structure, standing, and accomplishments
  - ▪ Organization Constitution, bylaws, and mission
  - ▪ Organization Goals and objectives
  - ▪ Organization Calendar
  - ▪ Officer and Committee job descriptions
  - ▪ Status reports on ongoing/upcoming projects
  - ▪ Previous meeting minutes
  - ▪ Usernames and Passwords (email accounts, computers, social media sites, listservs)
  - ▪ Contact lists with addresses and phone numbers
- ☐ A brief write-up with suggestions, recommendations, challenges, or insights
- ☐ Synopsis of financial standing of organization (in consultation with Treasurer), including budget

☐ Switch officer names on student organization checking account
☐ Update the new leader's name and information in the Student Organization management pages
☐ _____

☐ _____
☐ _____

Lastly, encourage new officer shadowing and use your advisor as a resource!

the SOURCE

the student organization resource center