

CHECKLIST OF RESOURCES TO PASS ON TO NEW OFFICERS

- Position Binder/Folders/General Information/Notebooks/Pertinent Email Communications
- Important Organizational Documents
 - Constitution/Bylaws
 - Organization mission/vision
 - Governing organization constitution/bylaws (if applicable)
 - Financial information & updates
 - Goals & objectives of organization
 - Calendar of social, philanthropy, administrative, university events
 - List of Officer/Committee members
 - Officer/Committee job descriptions
 - Ongoing/Upcoming projects
 - Confidential officer information (email accounts, computer access, social media, listservs, etc.)
 - Meeting minutes (at least 2 months)
 - Contact lists (student and adviser!)
- University Documents
 - University Mission Statement
 - Student Standards of Behavior & Code of Conduct
 - Student Organization Resource Guide
 - Event registration form / *OrgSync* software information
- Personal Notes
 - Summary of current structure, successes, failures, university standing, etc.
 - Suggestions, advice, recommendations
- Don't forget!
 - Update roster in *OrgSync*
 - Update websites, etc. to reflect new leadership / membership
 - Positional/Committee Year-end reports
 - Update names on financial accounts

Student Organization Quick Guide

Officer Transitions for Outgoing Officers

YOU MAY ALSO INCLUDE

- *OrgSync* tutorial
- List of important meetings
- Important administrative tasks (including the day to day)
- Sharing tasks and duties with other organization members (learn one another's positions)
- Introductions to key people (relationship building)
- One-on-one meetings and training
- Financial information
- Leadership training / retreats

IMPORTANT CONSIDERATIONS

- *Meet face-to-face to conduct officer transitions.*
- *Update Community so new officers have admin rights.*
- *Make sure new officers know how to reach you.*
- *Do they know student org policies and procedures?*
- *Make sure new officers know how to book space, register events and re-recognize for next year!*