Student Organization Quick Guide

Officer Transitions for Outgoing Officers

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/mission
  - 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

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!

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

Center for Student Involvement

go.udayton.edu/involvement