Transition Checklist for Outgoing Officers of Student Organizations

For all officers (including chairs/co-chairs):

☐ Schedule a time to meet with incoming officers to discuss topics such as…
  - Things to do and timelines
  - Resources you have found helpful
  - People to meet
  - Issues and/or areas of concern
  - Anything that you wish you had known when you began your position
    (See a sample agenda for a transition retreat or meeting)

☐ Gather important reports, correspondence, minutes, press clippings, etc. and place in a notebook or CD/jump drive to be transferred to the new officer.

☐ Explain the filing system to the new officer, including location of files and nature of filing (should include minutes, etc. as listed above).

☐ Transfer any materials, equipment, or other resources to the new officer.

☐ Complete all projects before the end of the year (eg: historians should complete scrapbook).

☐ Make plans to attend Celebrating Student Achievement events related to new officer induction and leadership awards. Encourage other officers to do so as well.

☐ Make plans to attend the Student Organization Appreciation Event and encourage all members/officers to do so as well.

☐ If you have an office, please return your keys to the Office of Student Leadership and Service.
  If you have voicemail, e-mail, or a website, change your outgoing announcement to indicate that you are not here during the summer.

For specific officers only:

Presidents

☐ Complete the annual End-of-Year Report, which is sent to you from the Office of Student Leadership and Service in March. Have officers and committee chairs report on their activities and/or meet with them to discuss the year and include the information in your report.

☐ Please complete the following items or pass them onto the new president to be completed by the end of April:
  o Report your organization’s incoming leadership roster to the Office of Student Leadership and Service.
  o Submit any calendar submission/space requests for the upcoming year to Campus Events.
**Treasurers**

☐ Complete the **End-of Year Budget Report** for your organization and return the completed audit to the Office of Student Leadership and Service before the end of the year (don’t forget to keep a copy for organization records).

**Secretaries**

☐ Distribute your organization’s minutes to the appropriate individuals before the end of the year, including the Offices of Student Leadership and Service and College Programs (see your organization’s constitution for details).