

OUTGOING OFFICER GUIDE

Outgoing Officer To-Do List

(Ideally to be completed by outgoing officers/executive board members)

In addition to gathering information for the new officers, the outgoing officer should tie up any loose ends in their position. Please check this list to ensure all necessary items have been completed.

1. Make sure to send your advisor the list of new officers.
 - a. Be sure to include the officer's name, title, and email.
 - b. Introduce new officers to your Advisor and explain how they support the organization.
2. Make new officers aware of staff in the Student Activities and Involvement area, including Involvement Consultants, explaining how these staff members assist with organization processes.
3. Organize all files, drive, and notebooks if any.
4. Prepare year-end reports and evaluation, if necessary.
5. Finish all necessary correspondence (e-mail, phone calls, etc.).
6. Develop an action plan and time-line for new officer transition, including but not limited to:
 - a. Necessary meetings attended and conducted by officer
 - b. Important tasks
 - c. Sharing tasks and duties with other group members
 - d. Introductions to key people / Relationship building
 - e. One on one meetings and training
 - f. Financial information
 - g. Leadership training / Student Org Conference
7. Complete Outgoing officer information sheet(s) (included in this packet)
8. Schedule a joint transition meeting or retreat between outgoing and incoming officers.
9. Make sure all contracts, bills, invoices, and outstanding balances have been properly completed and processed and all necessary payments have been

made. If any are in process at the time of transition, write a memo to the new officer noting what is complete/what needs to be done with them.

10. Make sure to tell the new President that they need to re-register the student organization for the upcoming academic year.
 - a. The new President should attend the Student Org Conference to re-register the organization. In order to hold events and meetings on campus during the upcoming year, the org will need to be registered.
11. Allow incoming officers to shadow outgoing officers if time permits.
12. Create an officer transition binder (see next page for suggested list of what to include in this binder), and share any documents with the new board members that were not included in the transition binder/officer handbook.