

Preparing Binders/Files/Notebooks

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

To more effectively transition, it is recommended that outgoing officers should keep the following documents throughout the year and organize them in a binder to hand off to the new officer.

Suggestions for Information to Include in Transition Binder

Items Related to the Organization:

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| 1. Mission Statement | 7. Organizational Calendar |
| 2. Constitution and By-Laws | 8. Organizational Goals |
| 3. Organizational Policies and Procedures | 9. Specific Officer / Position goals |
| 4. Student leader job descriptions | 10. Agendas and Meeting Minutes |
| 5. Budget information | 11. Committee Reports |
| 6. Year-end reports and evaluations | |

Items Related to the University:

1. University Mission Statement
2. Student Org Policies and Handbook
3. Student Activities and Involvement's "Guide To" *available on the USD website (www.sandiego.edu/student-leadership/guide-to.php)

Additional Helpful Resources:

1. Important names and numbers (contact list)
2. Pertinent correspondence
3. Resource list
4. Important forms
5. Organizational goals - both met and unmet
6. Name and contact information of outgoing officers
7. Unfinished project information
8. Do's and Don'ts, helpful hints and lessons learned