

Officer Transition Checklist

Basic Checklist

To preserve the continuity of your RSO, it is important to stay organized and maintain records. Use this checklist as a guide to help you transfer as much information as possible to incoming officers.

Here is a master list of transition items by category! Complete the list with any additional tasks that relate to your particular position.

Officer Specific Materials:

- A copy of the constitution, by-laws, chapter policies, and procedures
- Officer Job Description – as outlined in by-laws and revised by outgoing officer
- S.M.A.R.T. Goals and objectives from the previous year
- Status report for ongoing projects and past projects
- Previous meeting minutes/agendas and officer reports
- Financial records/budget relating to officer position/organization in prior years
- Organize all notebooks, binders, files, and electronic document folders
- Finish all necessary correspondence (letters, e-mails, phone calls, etc.)
- Develop action plans and timelines for new officer transition, including but not limited to:
 - Necessary meetings attended and chaired by the officer
 - Important tasks
 - Introductions to key people for relationship building purposes (advisor, student centers staff, SL staff)
- Complete Outgoing Officer Information Sheet(s)
- Sponsorship information (i.e. what organization, event, etc.)
- Electronic copies of posters/flyers/t-shirt designs
- Templates for forms/letters, meeting agendas
- Equipment Inventory list (i.e. computers, tables, chairs, supplies, etc.)
- Login information/password for Student Central page, social media pages, emails, website, etc.

University Specific Materials:

- University Student Center Polices
- RSO Recognition Policy & Registration Process
- Advisor Handbook
- Advisor Agreement Form
- RSO Packets (Beginning & End of Semester)

Contact Information For:

- Organization Advisor
- Student Involvement Office
- Office of the Dean of Students
- Other student organization contacts you typically partner with (clubs, fraternities/sororities, etc.)
- University Resources (vendors, Event Services, BHLF, catering, etc.)

- Emergency Contact Information (UDPD, EHS, Student Health Services)
- Outgoing person's contact information (in case there are questions when the new person takes office)
- UD staff contacts (faculty/staff/advisor, Student Involvement AD or PC, etc.)
- Vendor contacts (i.e. dining services, transportation services, t-shirt companies, etc.)

Words of Wisdom:

- Mistakes you made that could have been avoided (areas of future development)
- Achievements
- Advice you wish you had before assuming office last year
- Questions the new officer may have

Other:

- Governing Information (by-laws, meeting times, contact information)
- Historical Files (founding information, mission statement, alumni contacts, etc.)
- Planning calendar that denotes critical dates (RSO anniversaries, annual events, etc.)

Officer Transition formats:

Independent Study: Incoming officers review transition materials including officer expectations and responsibilities individually and then discuss them with outgoing officers at a specified time/meeting. It is the responsibility of the incoming officer to take notes and ask the outgoing officers specific questions.

Individual Learning Plan: Developed individually between incoming and outgoing officers, learning plans outline a pre-established list of skills and tasks that incoming officers must satisfy in order to be eligible to run for/hold a specific office in the organization. Please note, if using this format, it should be outlined in the RSO constitution and by-laws. Learning plans are best established by an organization's executive board that examines the officer role from a variety of perspectives. Once the list is complete, incoming officers meet with outgoing officers to identify their strengths and skill level for each identified task. Lastly, outgoing officer should provide training to assist incoming officer with skills to equip them for their new role.

Shadowing/Mentoring: Incoming officers are paired with outgoing officers for a specific period of time to learn position basics and to observe the outgoing officers in action.

Retreats/Workshops: This can be accomplished in many different formats, including half-day or couple of days long, and on or off campus. The goal is to provide an opportunity for incoming and outgoing officers to transition materials and discuss pertinent issues.

Questions to consider during Transition Meetings:

- What do you consider to be the responsibility of your office?
- How is success defined in this role?
- What did you hope to accomplish in your role?
- What did you try that did not work? Why?
- What problems or areas will require attention within the next year?
- Who/what resources were the most helpful in getting things done?

- What key relationships need to be built?
- What are the immediate priorities of this position?
- How did you work with other officers?
- What specific paperwork is required of the officer?

Additional Notes/Details Discussed:
