

Officer Transition Check List

Most successful student organizations implement some form of officer transition program. In order to be most effective, club officer terms should provide at least one month of overlap so that new officers have the opportunity to work closely with outgoing officers in order to understand the roles and responsibilities of their respective leadership positions. Keep this resource for when you transition next year!

OUTGOING AND INCOMING OFFICERS MEETING

✓ Check List

- ___ Overview of the agenda and discussion of the goals of the meeting.
- ___ History of the club: From past to present.
- ___ Review short and long term goals of the group, and progression toward them.
- ___ Review of financial status and accounting history of the club.
 - Provide transaction history (obtainable from Deb Acrey dbaldoni@nd.edu)
 - Provide CCC/FMB allocation request
- ___ External review: Overview of past year's programs, events and activities.
 - Successes
 - Areas for improvement
 - Advice for the future
- ___ Internal review: Overview of internal organization affairs
 - Successes with membership participation/development
 - Areas of difficulty/Areas for improvement
 - Advice for the future
- ___ Discuss SAO and University Policies (see *The Source* online at sao.nd.edu)
 - Pass on the Club Information Meeting folder (if applicable)
 - Complete Club/Org Registration form (found at <http://sao.nd.edu/studentgroups/registration/index.shtml>)
- ___ Pass on important information like:
 - Net ID email address and password (Can also be used for webfile and website management)
 - FOAPAL number (Club account number for charging and reimbursements)
 - How and when to use SAOnline

INCOMING OFFICERS AND ADVISOR MEETING

- ___ Discussion over the role of the advisor in the club (Role of the Advisor activity suggested in *The Source*).
- ___ Discuss goals of the group for the coming year. Be sure to review long term goals established by past administrations.
- ___ Discuss ideas for internal group development (i.e. icebreakers, dinners). – See Mary Kate for ideas
- ___ Discuss ideas for external group programs (i.e. events and activities).
- ___ Discuss budget for following year (pending CCC/FMB allocation, if applicable).
- ___ Establish dates for follow through.
- ___ Discuss possible appointments of committee leadership.

Maintaining your Organization

Moderating a successful transition happens throughout the year. Here are some great ideas on how you can run a successful organization, while at the same time preparing for your future leadership.

- Keep accurate, clearly labeled records.
- Organize your office, materials, and thoughts.
- Incorporate a formal transition policy into your organization's by-laws/constitution.
- Develop job descriptions for all officers. New officers will know what to do right away.
- Create informational/resource binders for every important leadership position in the organization.
- Write down any policies and procedures which are essential for carrying out the duties of your position.
- Introduce important resource persons to those you are mentoring for leadership.
- Create a reflection and goal setting session with the entire organization membership. Find out what direction they want to take the group--then, meet as an executive board and establish goals and objectives for the organization.
- Retreats or casual meeting are great opportunities for old and new officers to share ideas and solve problems cooperatively.
 - Old leaders can share leadership experiences
 - New leaders will be given the opportunity to learn about the original mission
- Meet with any related offices on campus to begin to foster good working relationships. For more information on related offices your club may wish to meet with, contact the Student Activities Office at sao@nd.edu.
 - Examples Include:
 - RecSports (Athletic Clubs)
 - Center for Social Concerns (Social Service and some Special Interest Clubs)
 - MSPS (Cultural Clubs)
- If there are changes in officers throughout the year, complete the Change of Officer form <https://www3.nd.edu/~sao/studentgroups/groupresources/paperwork/changeofficer.shtml> (not applicable in April – please complete Club/Organization Registration).

Some information found on: <http://dccjaisalmer.blogspot.com/2008/04/leadership-important-tips.html>