

Transition Check List

There is nothing more frustrating than discovering that you have re-invented the wheel! Without smooth officer transition, the new officers spend about half of their term of office re-inventing what the officers before them had already learned. It is very hard for an organization to move forward with this waste of time and energy. That's why officer transition is such a key element in the life of an organization. Instead of spinning it's wheels the organization can then build upon the foundations and previous knowledge.

When should the transition take place?

Elect officers about one month before they are to take office. This gives an adequate overlap period for new and old officers to work together. Keep in mind that chartering for the next academic year occurs in early April so *you should always plan on having your elections no later than the first week of April.*

Checklist

This checklist is intended to provide new officers a complete orientation of their duties and responsibilities. Some ideas will pertain to your organization while other ideas may not be suitable, but some will help all organizations. Please checkmark the boxes as you complete each task (again, you may not have to check all of the boxes-only complete the tasks that fit your organization).

Information about the organization:

- Review organization's constitution, mission, and bylaws
- Review Responsibilities of Chartered Clubs/Organizations (found in your Student Organization Handbook)

Officer's Roles

- Review and pass on old records, binders, files, notebooks, and correspondence
- Review all job descriptions
- Review old agendas and minutes
- Review old officer/board achievements & areas that need improvement
- Review and pass on the Student Organization Handbook to the President
- SECRETARY-pass on membership list, addresses, phone numbers, emails, and obtain the organization's copy code.
- TREASURER-pass on treasurer's financial accounts, fundraising information, and all copies of financial records. Review check requests, how to reimburse, how to deposit money, where the organization's mailbox is, and obtain the organization's account # and copy code.
- Pass on key contact people list (Student Center & Activities, Catering, Meeting & Events, Business Office, Dean of Students)
- Make sure your contact list/roster is updated in the Student Center & Activities Office

- If your group has a stkate.edu email address, make sure the group manager/contact (usually the President) is changed-email Kimberly Osland to notify her of the manager change. If your group does not have a stkate.edu email address and would like one, please email Lindsay at lacastelein@stkate.edu and she'll get you started.
- Review how to make buttons, make banners, use the poster maker, reserve an Atrium table, and what resources are available in the Student Organization Center.
- Exchange summer contact information for the new officers

Programming

- Discuss future programming ideas
- Develop a calendar with meetings, potential programs and events
- Develop a web page or learn how to update your web page
- Discuss meetings times (place & time)
- Discuss who will be in charge of organizing your club's participation in the fall Activities Fair

Goal Setting

- Evaluate past year's concerns and achievements
- Establish new officers/board goals
- Plan a group goal setting session for the next meeting (use enclosed handouts or Lead Team for help)

NOTE: This checklist is your RSVP to the Transition Party (WITH PRIZE DRAWING) on April 28th from 4-5:00pm in the President's Dining Room (3rd floor Coeur de Catherine). We encourage all incoming and outgoing officers and advisors to attend the reception. If your group would like to attend this reception, please turn in this checklist by April 27th.

Club/Organization Name: _____

Number attending: _____