

Outgoing Officer To Do List

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. **Register your organization.** Visit the Center for Student Involvement website to learn more about the registration timeline & requirements. Missing the priority deadline to register could result in a loss of room reservations, ability to participate in Activities Carnival, and access to other resources.
2. **Communicate with your advisor.** Make sure to send your advisor the list of new officers. Be sure to include the officers' names, position titles, contact phone number, and K-State email.
3. **Develop an action plan and timeline for new officer transition,** including but not limited to:
 - a. Complete Outgoing Officer Worksheet
 - b. Necessary meetings attended and conducted by officer
 - c. Important tasks
 - d. Sharing tasks and duties with other group members
 - e. Introductions to key people / Relationship building
 - f. One on one meetings and training
 - g. Financial Information
 - h. Leadership training
 - i. Schedule a joint retreat between outgoing and incoming officers
 - j. Allow incoming officers to shadow outgoing officers if time permits.
 - k. Create an officer transition binder and share documents
4. **Finish all necessary correspondence** (letters, e-mail, phone calls).
5. **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.
6. **Reserve spaces on campus for upcoming meetings/events.** Make sure space is reserved for all annual events, and get a copy of these reservations.
 - a. To reserve rooms in the K-State Student Union, contact the Union Director's Office, (785) 532-6591, reservations@k-state.edu, or visit their website <https://union.k-state.edu/book-a-space>.
 - b. To reserve other K-State classrooms and facilities, contact rooms@k-state.edu.
7. **Organize [OrgCentral portal](#), files, and shared documents.** The information listed on your OrgCentral portal is your official listing with the University. Please make sure your roster, primary contact, and about section are complete and up to date.
8. **Prepare year-end report and evaluations, if necessary.**

Preparing Binders/Files/Notebooks

To properly transition, 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 What to Include:

Items Related to the Organization:

1. Organizational Mission Statement
2. Organizational Constitution and By-Laws
3. Organizational Policies and Procedures
4. Governing Organization Constitution and By-Laws
5. Student leader job descriptions
6. Budget information, including any bank account numbers *make sure bank has updated contact info
7. Social Media accounts and passwords
8. Year-end reports and evaluations
9. Organizational Calendar
10. Organizational Goals
11. Specific Officer / Position goals
12. Agendas and Meeting Minutes
13. Committee Reports

Items Related to the University:

1. University Mission Statement
2. Student Organization Policy *available on CSI website
3. University Brand Guide

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

Outgoing Officer Worksheet

Outgoing Office Personal Information

Position Title:

Name:

Phone Number:

Email Address:

Date:

Directions

Think through and respond to the following questions regarding your responsibilities; this information will be helpful to your successor. Lessons learned from this reflection can be shared with incoming officers verbally or in written format.

Questions

1. The responsibilities of my position included:
2. List other officers with whom you worked and the projects involved:
3. List what you enjoyed most and least regarding your position:
4. Who was the most helpful in getting things done? Who were good resources? List other aids that helped complete your job:
5. Things you wish you had known before you took the job include:

6. List specific accomplishments realized during your term in office and the reasons for their success.
What did you try that worked well and would suggest doing again? Why? Cv
7. List any problems or disappointments you encountered as a part of your position and suggest ways of avoiding or correcting them. What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?
8. What could you have done to make this a better experience?
9. List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, university / college officers, community resources, etc.
10. Create a timetable/list important dates related to your position. Provide suggestions for increasing efficiency and effectiveness.
11. What should be done immediately during the summer? In the fall?
12. List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

Outgoing Officers Major Accomplishments

Accomplishments	Barriers/Limitations	Resources	Solutions	Still To Be Done

Student Organization Officer Transition Meeting Outline

Before the newly-elected officers of your organization officially assume their responsibilities, it can be helpful to host a meeting with the old and new officers. Transition meetings provide continuity and continued growth for the organization while allowing the new officers to learn from the experiences of the outgoing officers. The following outline can help make the transition meeting flow as smoothly as possible.

I. Welcome and Introductions

- A. Help participants get acquainted (consider an icebreaker activity)
- B. Explain the purpose and goals of the meeting

II. The Year in Review

- A. **Goals:** Review the group's goals for the previous year.
 - a. What did we hope to accomplish?
 - b. How well did we do on each goal?
 - c. What goals should be continued this year?
 - d. What goals need to be changed?
 - e. What goals are no longer feasible?
- B. **Programs and Activities:** Evaluate what your group did
 - a. How effective were the programs / activities we sponsored? How did we measure their effectiveness?
 - b. Did we have a good balance in our schedule of programs and activities? Were our programs and activities consistent with our goals?
 - c. What activities and programs do we want to repeat?
- C. **Membership:** Evaluate number of members and their commitment.
 - a. Do we have too many, too few, or just the right amount of members?
 - b. What actions did we take to recruit members? Were our recruitment efforts successful?
 - c. Are our members as actively involved as we want them to be?
 - d. What were the opportunities for members to get involved in a meaningful way?
- D. **Officers and Organizational Structure:** Evaluate officers and structure.
 - a. Are officer roles and responsibilities clearly described? How?
 - b. Did officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
 - c. Is the time and effort required in each position comparable?
 - d. Is there two-way communication between officers and members? How do the members feel about the officers?
- E. **Organizational Operations:** Evaluate finances, communication, etc.
 - a. Were the finances adequate for our group and managed properly?
 - b. Were meetings run effectively? Was their frequency adequate?
 - c. Did the committee structure work?
 - d. Did we have scheduling conflicts with other groups or activities?
- F. **Advisor Involvement:** Evaluate both quality and quantity.
 - a. Did our advisor provide the support we needed?
 - b. Did we give our advisors and other faculty a chance to get involved?
 - c. How could we improve faculty and advisor involvement?
- G. **Public Image:** Evaluate how other groups perceive you.
 - a. How do we see ourselves?
 - b. Is this how "outsiders" see us?
 - c. How can we enhance our image?

III. Your Legacy to the New Officer Team

- A. What are the current strengths and weaknesses of the group?
- B. What is the best advice you can give your successor?
- C. What were there major challenges and accomplishments in your term?

IV. Officer Transition

- A. Have the new and outgoing officers meet individually to discuss)
- B. Responsibilities of the position, with a job description
- C. A timetable for completion of annual duties
- D. Unfinished projects
- E. Important contacts and resource persons
- F. Mistakes that could have been avoided
- G. Advice for the new officer
- H. Any questions the new officer may have
- I. Where the outgoing officer can be reached with future questions

V. Wrap-Up

- A. "Pass the torch" in a semi-official ceremony in front of outgoing and incoming board and wish everyone luck!
- B. Provide an opportunity for informal socializing.

Adapted from: The Wichita State University Student Organizations' Handbook (1992-1993)

Incoming Officer To Do List

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1. **Make sure your organization is registered with the Center for Student Involvement.** Visit the Center for Student Involvement website to learn more about the registration timeline & requirements. Missing the priority deadline to register could result in a loss of room reservations, ability to participate in Activities Carnival, and access to other resources.
2. **Meet with outgoing officer**, if possible. Discuss important topics, including but not limited to:
 - a. Important tasks to be completed by your position
 - b. Tasks/duties shared with other officers
 - c. Financial Information
 - d. Shadow outgoing officer if time permits.
 - e. Review any shared documents, position descriptions, etc...
3. **Complete the Incoming Officer Transition Worksheet.** You can do this with the outgoing officer when you meet.
4. **Communicate with your advisor.** Establish expectations, communication preferences, and meeting times.
5. **Learn about your role as a student leader.** What are the expectations of your position from your advisor? Your officer team? Your organization as a whole?
6. **Practice goal setting.**
7. **Meet with all incoming officers as a group.**
8. **Attend a Student Org Basics presentation.** These sessions are provided by the Center for Student Involvement. You can attend a scheduled session as posted on the [CSI website](#), or you can request a session with the Assistant Director for Leadership by emailing studentinvolvement@ksu.edu.
9. **Reserve spaces on campus for upcoming meetings/events.** Make sure space is reserved for all annual events
 - a. To reserve rooms in the K-State Student Union, contact the Union Director's Office, (785) 532-6591, reservations@k-state.edu, or visit their website <https://union.k-state.edu/book-a-space>.
 - b. To reserve other K-State classrooms and facilities, contact rooms@k-state.edu.
10. **Familiarize yourself with your [OrgCentral portal](#), accounts, files, contracts, and shared documents.** The information listed on your OrgCentral portal is your official listing with the University. Make sure your roster, primary contact, and about section are complete and up to date.

Incoming Officer's Transition Worksheet

The new officer can ask these questions to the outgoing officer to gain a solid understanding of the position.

1. Things specific to the position I want to know about (forms, duties, etc...)
2. Things I should do over the summer...
3. People (positions) that I should get to know...
4. Services that I need to know about...
5. Things I need to know about working with my advisor...
6. Other questions I want answered...
7. What do you consider to be the responsibilities of your position?
8. What expectations do you have of the executive council/board?
9. What expectations do you believe your members have of you?
10. What problems or areas will require attention within the next year?
11. What should be done immediately in the fall?

Incoming Officers Meeting Agenda

Together you should discuss the following topics.

- Goals & Priorities for the organization
- Expectations of each other & clarify position responsibilities/duties
- How will we support our members as we work towards our goals
- How often will we meet as officers? as an organization?
- How will we communicate with each other
- What do we want/need from our advisor?