Leadership Transition Checklist

An organized transition provides training for new officers, closure for the outgoing leaders, and helps the organization maintain consistency from year to year. A smooth transition is the responsibility of both the outgoing and incoming members of an organization!

- **Set up a meeting and/or plan a retreat**
  - Don’t just drop off a binder and leave a note that says, “Good luck!” Make sure that the outgoing and incoming officers meet together – uninterrupted – for an hour or two (or as long as it takes to answer the questions).
  - Retreats are a fun way to train new officers. Retreats held off-campus help facilitate good relationships and are a great way to avoid distractions or disturbances. Topics to consider on a retreat include: goal setting, idea brainstorming, group development, strengths and weakness of the organization, advice for new officers, and direction of the organization. Make sure to plan some fun as well!

- **Share files related to your position and organization**
  - What? You don’t keep any files? At least make notes on important projects or tasks that were completed! And encourage next years’ officers to keep files for the future.
  - Written information is very helpful if the outgoing officer is graduating.
  - Make sure the incoming officer has a copy of the following items:
    - Mission, philosophy, goals and/or purpose statement of organization
    - Organization’s constitution
    - Position description of officers and members
    - List of committees and their description
    - Member and officer contact list
    - Contact information for important people and offices on campus
    - List of basic annual procedures and/or calendar of annual events
    - Website and email information. How do you maintain your website?
    - Financial records
    - Evaluations of previous and current projects
    - Meeting minutes and agendas
    - Any historical records of the organization

- **Make introductions to resources**
  - Schedule time to walk around campus together so the outgoing officer can make introductions to the important people who are resources to the incoming officers.

- **Review the following topics**
  - **Yearly calendar**
    - Take out a calendar of this school year and review it together. What were the busy times? What kinds of things should the new officer anticipate? You may
not remember how crazy it was last fall, but looking at your calendar may jog your memory.

- **Review budgets and funding**
  - What is the financial status of the organization?
  - Where did the organization get money from this year?
  - Did the organization apply for funding and/or receive funding through any campus funding boards?
    - Which fundraisers worked and which didn’t?

- **Review past and future organization events**
  - Which events were successful this year? Which should be continued?
  - When should the planning start?
  - Which events didn’t go well? Should they be revamped and tried again or just dropped?
  - Were there any pitfalls or things that could have been improved?

- **Meetings & organization**
  - Where were meetings held? What worked? What didn’t?
  - Has a summer contact list been created for the organization?
  - What is a typical week like?
  - What were the most and least challenging parts of responsibilities?

- **Recruitment activities**
  - What recruitment activities were done? What worked? What didn’t work?
  - Why did new members stick around? If they didn’t – what made them leave?

☐ **Have all new officers meet individually with their predecessor and discuss the following:**
  - Responsibilities of the position.
  - Timetable for completing duties of the position.
  - Unfinished projects.
  - Important resources and contact persons.
  - Mistakes that you made that could have been avoided.
  - Advice the outgoing officers wish they had been told last year.
  - Any questions the new officer may have for the outgoing officer.

☐ **Next steps**
  - Work together to make a list of “things to do” for the incoming officer.
  - Which items need their attention now?
  - Make this list together so the outgoing officer can help with direction.
  - Make sure to trade contact information so that the outgoing officer can be a resource in the year ahead!