# Transition Guide

**Outgoing Officer Checklist**

1. Organize all notebooks, binders, files, and electronic document folders

2. Finish all necessary correspondence (letters, e-mails, phone calls, etc.)

3. Develop action plans and timelines for new officer transition, including but not limited to:

* Necessary meetings attended and led by the officer
* Important tasks to do each semester
* Introductions to key people (relationship building)

4. Complete Outgoing Officer Information Sheet(s)

**Important Information to Pass on in Your Officer Area (Canvas or Print)**

A binder/electronic copies of the following recommended resources should be compiled and given to the incoming officer:

**People (Contact Information)**

* Outgoing person’s contact information (in case there are questions when the new person takes office)
* Other student organization contacts
* Park University staff contacts (faculty/staff/alumni advisor, advisor, etc.)
* Vendor contacts

**Documentation**

* Position description/responsibilities of the position
* Calendars/Timelines
* Sponsorship information (i.e. what organization, event, etc.)
* Electronic copies of posters/flyers
* Meeting agendas
* Meeting minutes
* Templates for forms/letters
* Budgets from prior years
* Financial documents (i.e. receipts, invoices, etc.)
* Electronic copies of all important documents (i.e. constitution, policies, procedures, etc.)
* Login information/password for Social Media, Google Docs, Documentation for Canvas

**Key Activities, Initiatives, and Events**

* Information for any past vendors used (i.e. caterers, transportation services, DJ, etc.)
* Descriptions of past events, checklists, plans, etc.

**Outgoing Officer Transition Checklist**

This checklist is intended to provide new officers a complete orientation of their duties and responsibilities that is provided by your organization’s outgoing officers.

**A. INFORMATION ABOUT THE CLUB:**

\_\_\_\_\_ Review past events/work done in previous years

\_\_\_\_\_ Review College Policies and Procedures (Student Code of Conduct, available on Park’s

 website)

\_\_\_\_\_ Review the organization’s constitution and/or mission statement

**B. OFFICER’S ROLES AND PRINTED MATERIALS:**

\_\_\_\_\_ Review and pass on told records, binders, files, notebooks, and important

 correspondence

\_\_\_\_\_ Review job/officer descriptions

\_\_\_\_\_ Review officer’s written expectations

\_\_\_\_\_ Review club agendas and minutes

\_\_\_\_\_ Review event evaluations/survey results

\_\_\_\_\_ Review previous minutes, financial records, mailing lists

\_\_\_\_\_ Review your achievements

\_\_\_\_\_ Review your failures

\_\_\_\_\_ Pass on membership list, contracts, addresses, phone numbers, email addresses, etc.

\_\_\_\_\_ Provide financial information such as treasurer’s accounts, fundraising information and

 copies of completed requisitions.

**C. OFFICER INTRODUCTIONS:**

\_\_\_\_\_ Introduce officer to key contact people – include their telephone number and emails

\_\_\_\_\_ Presiding and function in meetings

\_\_\_\_\_ Have a final closing meeting with your group’s advisor

\_\_\_\_\_ New officer, old officer and advisor meeting