Checklist of Suggested Tasks for *Outgoing* Officers

Must do:

- ☐ Put new officer names on bank accounts.
- ☐ Inform new officers of all passwords to e-mail accounts, websites, mailboxes, etc.

Should do:

- ☐ Create and update an officer binder throughout the entire year. If you need assistance with organizing your binder please see the extended version of the *Officer Training and Transition Guide*.
- ☐ Organize your office, binders, papers, thoughts, etc.
- ☐ Finish all correspondence (paperwork to your national organization, Campus Life, etc.) that you can.
- ☐ Prepare an end-of-the-year report incorporating the organization's goals, activities, and accomplishments.
- ☐ Using the invaluable hindsight that you now have, identify the areas of responsibility, resources, event details, etc. that you wish someone had told you when you took office.
- ☐ When new officers have been elected, transition them together as a group with all of the outgoing officers. Include the organization's advisor in this process as well. Try setting up a retreat together. Outgoing officers should openly share what they believe went well and what they would change or could improve if they had it to do over again.
- ☐ Make introductions to key resources. Schedule time to talk with the new officers and introduce them to important people who can serve as valuable resources. In addition, make sure new officers meet with the organization's faculty/staff advisor.
- ☐ Do not "drop off the edge of the earth" – be available for consultation.

Checklist of Suggested Tasks for *Incoming* Officers

Must do:

- ☐ Complete the *Student Organization Officer Update* form available in Campus Life, UC 202, or by e-mailing leadership@semo.edu and return it to UC 202.

Should do:

- ☐ Update all necessary forms and change names on financial account.
- ☐ Learn and understand your responsibilities and expectations as an officer in your organization.
- ☐ Read through and familiarize yourself with the Student Organization Handbook, http://www.semo.edu/leadership/studentorgs/index.htm.
- ☐ Review your officer binder and previous executive reports. Become familiar with the general history of the organization and its recent activities. Remember you need to know all of the little details as well as the big picture.
- ☐ Determine the training and guidance you will need from the outgoing officers. This may not always be obvious, (e.g., it may be necessary for an incoming President to meet with the outgoing Treasurer).
- ☐ Make a list of the above information (general history, recent activities, goals, procedures, etc.) you might need to know to be successful.
- ☐ Try to generate more than one resource for each item you want to learn about.
- ☐ Make appointments with key people.
- ☐ Be patient; expect changes to be accepted gradually.
- ☐ Ask A LOT of questions.
- ☐ Try some icebreakers with the new officer team to formulate a strong team atmosphere.

Planning an Officer Training and Transition

Why Plan a Retreat?

A retreat provides new officers with an opportunity to start building their leadership team and to better to understand one another's roles and responsibilities as an officer.

Officer training and transition should to be designed with YOUR group in mind! What works best for your executive board? Things to consider:

- *Location*: Hold the training on campus? During a meeting? During lunch?
- *Timing*: Do you need just a few hours for officer training and transition? Or, do you need an all-day or weekend retreat?
- *Resources*: What information or support do you need to make this happen? Have you explored the Student Organization website, http://www.semo.edu/leadership/studentorgs/resources.htm? Have you contacted Campus Life and Event Services (UC 202, leadership@semo.edu, 573.651.2280) for assistance?
- *Key players*: Can all the new officers attend? Have you involved you advisor in planning the training? What about the outgoing officers?

Sample Transition Training Agenda (*about 2 hours*)

12:00 p.m.	Icebreaker activity
12:20 p.m.	Review purpose of the organization: mission, goals, relevant constitution and bylaws rules
12:35 p.m.	Break into pairs of outgoing and incoming officer (if outgoing officer is available) to review officer notebook and answer any questions.
12:50 p.m.	Discuss roles and expectations of each officer and the advisor (encourage advisor to be present)
1:05 p.m.	Brainstorm goals for the year
1:30 p.m.	Schedule 1st official meeting and plan how often the executive board, officers and advisor, etc. will meet
1:40 p.m.	Discuss upcoming events

For additional information regarding officer training and transitions, please explore the extended version of the *Officer Training and Transition Manual*.

Developed by:
Katharine Pei & Melissa Quinn (2010).

Adapted from:
Office of Student Engagement. (2009). *Planning an office transition training*. Springfield, MO: Missouri State University. Retrieved December 7, 2009 from http://organizations.missouristate.edu/assets/activities/sample_transition_training_agenda.doc
Student Life & Leadership (unknown). *Passing the baton: Student organization officer training*. San Diego, CA: San Diego State University. Retrieved April 22, 2010 from http://sll.sdsu.edu/studentorgs/dev-pass-baton.html