

# Outgoing Officer Preparation Checklist

This checklist is designed to assist outgoing officers in identifying pertinent information incoming officer will need to succeed in their roles. You will want to compile a document that captures the information outlined in this guide. Please complete PRIOR TO TRANSITION MEETINGS.

## OUTGOING OFFICER CHECKLIST

- Organize all email correspondence and electronic files
- Finish all necessary correspondence (letters, e-mails, phone calls, etc.).
- Develop action plans and timelines for new officer transition, including but not limited to:
  - Necessary meetings or initiatives attended and/or chaired by the officer.
  - Important tasks.
  - Introductions to key people/staff on campus, within region, or nationally. Foster the relationship by completing in person or virtual introduction to support continuity.
- Complete the Outgoing Officer Worksheet.
- Create/prepare/update Officer Manual, if applicable.
- Schedule a one-on-one meeting with the incoming officer.
- Provide the Officer Manual and Outgoing Officer Worksheet to the incoming officer at least 2 week prior to the one-on-one meeting.
- Have a one-on-one meeting with the incoming officer.
- If necessary, follow-up on specific action items from the one-on-one meeting.

## OFFICER MANUAL – WHAT TO INCLUDE

An electronic drive with copies of the following recommended resources should be compiled and given to the incoming officer:

### PEOPLE

- Outgoing executive board contact information.
- Campus, regional, and/or committee members and contact information.
- It is recommended that a virtual introduction be made to support continuity.
- Information for any third vendors used (e.g. caterers, hotels, transportation services, printers, t-shirt companies, DJs, etc.).

### DOCUMENTATION

- Electronic copies of all important documents (e.g. goals, policies, procedures, Bylaws, strategic/action plan, etc.).
- Calendars/timelines.
- Written programs (if any created for annual campus, regional, and national events and/or awards, etc.).
- Electronic copies of branded materials.
- Sample meeting agendas/minutes.
- Any login information or passwords (e.g. officer-specific email account).
- Budgets from prior years.
- Financial documents (e.g. receipts, invoices, etc.).
- Asset list (e.g. projector, pins, other inventory).
- Organizational checking and savings account information.

### KEY ACTIVITIES, INITIATIVES & EVENTS

- Descriptions of past and annual events, planning checklists, risk management plans, etc.
- Status update and next steps for ongoing projects and initiatives.

### WORDS OF WISDOM

- Mistakes you made that could have been avoided.
- Advice you wish you had before assuming office.
- Questions the new officer may have.

You should leverage technology to make the transition process seamless. Using Google Drive allows you to create folders for each officer position making it easy to pass on important documents and resources year after year. As noted above, outgoing officers should provide login/password information to their successors during the transition process.

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# Outgoing Officer Worksheet

## INSTRUCTIONS

These questions are designed to help you to reflect on your officer experience and should be completed **PRIOR TO TRANSITION MEETINGS**. Please be thoughtful in your responses to the questions. We recommend typing your answers in a separate document and printing prior to the transition meeting to guide your conversation.

## REFLECTING ON MY TERM

1. What I liked most about my position...
2. What I liked least about my position...
3. What would have made the experience better?
4. What were my goals and priorities when I began this position? Where are they now?
5. The top three obstacles to performing the duties associated with my position were...
6. The top three people or resources that supported me in my position were...
7. The top three things I wish I had known before I took officer were...
8. What skills did I develop in this position that I will carry with me to other leadership positions?
9. Were there missed opportunities during my tenure?

## LOOKING FORWARD

1. If you had 60 more days in this position, what would you focus on?
2. What problems or areas of need will require the most attention within the next 60 days? Next 6 months? Next year?
3. What should be within the next 30 days?