OFFICER TRANSITION CHECKLIST

At the end of every semester, take the following steps to ensure the smoothest transition within your organization. Below is a list of action items to perform and key information to share during the training of new officers.

In addition to following the checklist below, refer to your organization's constitution/bylaws and officer transition binders for more steps. For more detailed information, see the Officer Transition section and the transition worksheets in the Student Organization Manual appendix.

Action Items:

Leadership:
- ☐ Revise officer responsibilities as needed
- ☐ Elect new officials
- ☐ Schedule training for new officers
- ☐ Update faculty/staff advisor responsibilities as needed
- ☐ Schedule the introduction of new officers with faculty/staff advisor(s)

True Blue Connects (TBC):
- ☐ Re-register your organization for the next semester before finals
- ☐ Update the TBC primary contact
- ☐ Update rosters in TBC

Other:
- ☐ Change social media passwords
- ☐ Update access to online documents
- ☐ Update communication platforms (GroupMe, WhatsApp, etc.)
- ☐ Draft a budget for the next semester
- ☐ Ensure two future officers download the Microsoft Teams app and request MT access for next semester (in SOAR)

Information To Share:

Banking Information:
- ☐ Bank account number & Tax ID number
- ☐ Primary account holder info
- ☐ Ending balance

Social Media:
- ☐ Accounts in use (Instagram, TikTok, etc.)
- ☐ Username/password for accounts
- ☐ Posting schedule, if applicable

Leadership:
- ☐ Executive board/club officers' contact information
- ☐ Advisor(s) contact information

Meeting Information:
- ☐ Day of the week and time, if consistent
- ☐ Typical frequency (weekly or monthly)
- ☐ Location, if consistent

Club-Specific:
- ☐ Traditions, timing, etc.
- ☐ Prospective organization-wide goals
- ☐ Organization's event planning logistics

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