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--- Barack Obama, 44th President of the United States

*Change will not come if we wait for some other person or some other time. We are the ones we’ve been waiting for. We are the change that we seek.*
Outgoing Officer Guide

Outgoing Officer Check List

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 chaired by the officer
   - Important tasks
   - Introductions to key people (relationship building)
4. Complete Outgoing Officer Information Sheet(s) (enclosed)

Important Information to Pass on in Your Officer Manual

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 (clubs, fraternities/sororities, RHA, etc.)
- HU staff contacts (frequently contacted faculty, Student Activities, Housing and Dining, University Center, etc. staff)
- Vendor contacts
- Advisor Information – Student Activities and Faculty/Staff Advisor

Documentation
- Constitution
- Position description/responsibilities of the position
- Calendars/Timelines
- Sponsorship information (i.e. what organization, event, etc.)
- Electronic copies of posters/flyers/t-shirt designs
- Cabinet/Department meeting agendas
- Cabinet/Department meeting minutes
- Templates for forms/letters
- Budgets from prior years
- Financial documents (i.e. receipts, invoices, etc.)
- Asset list (i.e. tables, chairs, supplies, etc.)
- Electronic copies of all important documents (i.e. policies, procedures, constitution, etc.)
- Any login information or passwords

Key Activities, Initiatives, and Events
- Information for any past vendors used (i.e. caterers, transportation services, printers, t-shirt companies, etc.)
- Description and Evaluations of past events (Checklists, plans, etc)
  - What were the goals and which were achieved? Why or why not? Is it worth improving or should it be discarded? What went well? What were the challenges?
- Information on resources used to implement the specified events
- Did another organization or department play a role? What items were used?
  - Flyers, T-shirt designs, pictures, etc associated with events
  - Calendar of last year’s events
    - Are there any that are annual? Any new events? Should timing be changed?

**Words of Wisdom**

- Main challenges during the year with events and programs, working with other organizations, delegation of responsibilities among e-board, member recruitment, etc.
- Advice you wish you had before assuming office last year
Outgoing Officer Worksheet

TO BE COMPLETED PRIOR TO TRANSITION MEETINGS. Please think through and respond to the following questions regarding your responsibilities. This information will be helpful for your successor.

1. What I liked most about my position…

2. Trainings and sessions I attended… (Collegiate Link 101, Greek Excellence Workshops, conferences, etc)

3. What I liked least about my position …

4. The most difficult decision I made was…

5. What I could have done to make the experience better…

6. Obstacles to performing my position responsibilities effectively were…

7. Things that helped me better handle my position were…

8. Things I wish I’d known before I took office were…

9. One University policy or procedure that I really had trouble with was…
Maintaining Continuity: Transition Questions

Outgoing Officers

1. What do you consider the goals/purpose of this organization to be? Does that align with the mission statement? If not, should it be changed and how so?

2. What do you wish you had done, but did not?

3. What did you try that did not work? What were the challenges?

4. What problems or areas will require attention within the next year?

5. Who was the most helpful in getting things done? (Who were good resources?)

6. What should be done immediately in the summer and in the fall?
Maintaining Continuity: Transition Questions

New Officers

1. What does the organization’s mission statement mean to you? Does it accurately reflect the purpose of the organization?

2. What do you consider to be the responsibilities of your office?

3. What are your expectations of yourself in this office?

4. What expectations do you have of the rest of the Executive Board?

5. What expectations do you believe others have of you?

6. What problems or areas will require your attention in the next year?

7. What should be done immediately in the fall?

8. Who do you anticipate will be the most helpful in getting things done?

10. Write down one specific problem you anticipate encountering during your term and how you will go about overcoming it.

11. Are there any changes you would like to make concerning the organization or your position? Why? How will you make these changes?
## Incoming Officer Goal Setting

<table>
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<th>What I Would Like to Accomplish</th>
<th>Barriers/Limitations</th>
<th>Resources I Can Use</th>
<th>Questions to be Answered</th>
<th>Why I Want to Do This</th>
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One-on-One Meeting

The following will help guide your conversation by focusing on past accomplishments and providing a critical evaluation of the year in office.

Agenda

★ Organization mission, purpose, and history
★ Responsibilities of the position
★ Timeline for completing duties of the position
★ Unfinished projects
★ Important resources and contacts
★ Mistakes the outgoing officer made that could have been avoided and/or challenges during the year
★ Advice the outgoing officer wishes they had been told before taking office last year
★ Questions from the incoming officer
★ Outgoing officer contact information (in case more questions arise)
★ Words of Wisdom