Congratulations on successfully completing another semester with your student organization! One of the largest obstacles to student organization longevity is the transition between leaders. However, if your club makes an effort to prepare, the transition will be much smoother. Use the checklist below to guide your organization through this exciting process. Please note that this checklist is not intended to be exhaustive; tailor it to your organization’s needs for best results.

Pass down any and all relevant account information (including login information)

- Create a secure method of transferring login information to ensure new officers can access any accounts needed well before the semester begins
- Create a centralized email address and use this for all accounts (Venmo, Slack, etc.) to ensure that account access is not lost when officers graduate

Create a semester timeline with any pertinent deadlines

- Be sure to highlight when new officers should expect club re-registration, budget info on CampusGroups, club fest registration to be open, etc.
- Ensure that club officers are aware of how to add officers on Campus Groups and that incoming officers are added to your CG page
- Create a timeline for the planning of signature events associated with your organization (reserving rooms, submitting payments, etc.)

Set up a preliminary meeting between the incoming officer(s) and your club’s advisor

- You want your advisor to be aware of any changes in leadership so that they are up-to-date on club happenings and well informed for anything your organization may need
Centralize necessary documentation

- Create a centralized folder (ie. a google folder) that contains:
  - A copy of the constitution, by-laws, policies, and procedures
  - Officer Job Descriptions – as outlined in by-laws and revised by outgoing officer
  - Goals and objectives from the last year
  - Status reports for ongoing projects and past projects
  - Previous meeting minutes/agendas and officer reports
  - Financial records/budget relating to officer position/organization
  - Event plans or templates for any events your club has thrown in the past, especially for signature events associated with your organization
  - Room reservation procedures (scheduling@cornell)

Compile all necessary contact information

- SAFC email address (safc@cornell.edu)
- Campus Activities email address (activities@cornell.edu)
- Information for any departments, off-campus organizations, and other student organizations you work with
- Compose this information on a set document and put it in your centralized organizational folder (i.e. a google drive folder for the club)

Allow enough time for incoming officers to shadow and ask questions

- This allows incoming officers to develop their learning processes, meet people, and practice the tasks associated with the position
- Set a meeting with incoming and outgoing officers to discuss the transition

Advice to Share with New Officers

- What made you successful in this role?
- What do you wish you knew or prepared more for coming into this role?
- What do you think are some of the more nuanced responsibilities of the role new officers should be aware of?