The following is a list of transition information that incoming and outgoing officers should work together on in order to transfer information and resources prior to a new year. This list is not intended to be exhaustive—please add organization-specific information and resources to better tailor to your group’s needs.

**History**
- A copy of the charter, by-laws, and any policies/procedures
- Purpose/mission statement
- Membership lists (current members and alumni)
- Photos/scrapbooks/historical materials
- Goals and objectives from last year
- Organizational culture: strengths and weaknesses
- Organizational chart and position descriptions

**Year-End Review**
- Previous agendas and minutes
- Calendar from past year
- Program information from previous year
  - Sample posters/flyers
  - Press releases
  - Planning documents
  - Contracts, invoices
- Status report for ongoing programs (room reservations…)
- Any unfinished business
- Important e-mail or PantherSync correspondence

**Finances**
- Account number
  - Credit Union
  - University (if grant-funded)
- Account statements
- Account access—transfer account signers
- Checkbook and ledger
- Current and future budgets
- Outstanding debts
- Grant applications and necessary action that new officers need to take to receive funding
University Processes and Materials

- Student organization office—pick up keys
- Renew organization (before fall semester)
  - Update and renew organization’s profile in PantherSync
  - Have Officers and Advisor read contract terms online
  - Print, sign, and submit updated organization profile to Student Involvement by due date

Roles and Responsibilities

- Letter or interview from outgoing officer
  - Advice
  - Experiences
  - What was improved upon this year
  - Things to know when getting started
  - Priorities
- Officer job description (as outlined in by-laws, but includes notes from outgoing officer)
  - “Big picture” and small details
- Group dynamics/climate of the organization

Skill Building

- Enroll in CODE program track or series
- Leadership
- Meeting management
- Time management

Resources

- Officer Manual
- Supplies
- Log/in access information to organization email address and social media accounts
- Membership application (if applicable)
- University Policies and Procedures
- Contact information
  - Current members
  - Advisor(s)
  - National/international/local headquarters
  - Alumni
  - Student Involvement organization liaison
    - Tom Dake, Rick Clark or Kirstin DeMartino
  - Student Association
- University Resources (i.e. REPS, Union Marketing, academic departments, etc.)

Adapted from University of Texas Arlington: http://www.uta.edu/studentactivities/organizations/handbook.php

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