



CHIEF OFFICER TRANSITION CHECKLIST



Contact Information

- ☐ Update Primary Contact on Involvement Network
- ☐ Update organization roster on Involvement Network by removing/adding members and updating officers
- ☐ Update and/or share login information for necessary accounts (organization/officer email, bank account, etc.)
- ☐



Communication

- ☐ Introduction to advisor(s), if applicable
- ☐ Introduction to relevant partners you will work with in this role
- ☐



Nuts & Bolts

- ☐ Review organization constitution and/or bylaws and update as necessary
- ☐ Review position description and organization structure
- ☐ Review organization/officer budget
- ☐ Review prior documentation (meeting minutes, calendars, expenses, paperwork, etc.)
- ☐ Re-register your organization with ELS for the upcoming year
- ☐



Training Resources

- ☐ Student Organization Manual
- ☐ ELS training videos (involvement.uga.edu)
- ☐ Review relevant University policies (ex: Solicitation Policy, Trademark Policy, Student Activity Fee Guidelines, Policy for Programs and Activities Serving Minors, etc.)
- ☐ Review resources from national organization, if applicable
- ☐ Attend Presidential Summits and Collegiate Leadership Conference hosted by ELS
- ☐



To-Dos

- ☐ Complete a SOAR analysis of the organization to identify strengths, opportunities, aspirations, and results
- ☐ Develop a personal vision statement
- ☐ Develop your team (ice breakers, shared vision and aspirations, possible challenges, etc.)
- ☐ Set mutual expectations with advisor(s), officers, committee members, etc.
- ☐ Set organization calendar (meeting dates, events, annual procedures, etc.)
- ☐ Revisit goals throughout your term and make adjustments as necessary
- ☐ Prepare for your successor's transition into your role
- ☐





SAMPLE OFFICER TRANSITION CHECKLIST



Contact Information

- ☐ Update and/or share login information for necessary accounts (such as organization/officer email)
- ☐
- ☐



Communication

- ☐ Introduction to advisor(s), if applicable
- ☐ Introduction to relevant partners you will work with in this role
- ☐
- ☐



Nuts & Bolts

- ☐ Review organization constitution and/or bylaws and update as necessary
- ☐ Review position description and organization structure
- ☐ Review officer budget
- ☐ Review prior documentation (meeting minutes, calendars, expenses, paperwork, etc.)
- ☐
- ☐



Training Resources

- ☐ Student Organization Manual
- ☐ ELS training videos (els.uga.edu)
- ☐ Review relevant University policies (ex: Solicitation Policy, Trademark Policy, Student Activity Fee Guidelines, Policy for Programs and Activities Serving Minors, etc.)
- ☐ Review resources from national organization, if applicable
- ☐
- ☐



To-Dos

- ☐ Review SOAR analysis of the organization to identify strengths, opportunities, aspirations, and results
- ☐ Develop a personal vision statement
- ☐ If applicable, develop your committee (ice breakers, shared vision and aspirations, possible challenges, expectations, etc.)
- ☐ If applicable, Set mutual expectations with advisor, officers, committee members, etc.
- ☐ Set calendar (meeting dates, events, annual procedures, etc.)
- ☐ Revisit goals throughout your term and make adjustments as necessary
- ☐ Prepare for your successor's transition into your role
- ☐



Engagement, Leadership, and Service

Student Affairs

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