



## Checklist for Officer Transition

Congratulations on either being elected for a stuorg officer position or finishing up your term! The Leadership and Service Center has created a checklist to guide your transition process. Please keep in mind there are links to different worksheets for you to check out that will help you with your transition process! There is an [additional resource on our website](#) that further explains the importance of officer transitions, what is needed, suggestions, and what topics to cover.

1. Create and share an Outgoing Officer Transition Document
  - a. [LINK to Transition Document Template](#)
2. Fill out the Incoming Officer Reflective Questionnaire
  - a. [LINK to Reflection Questions Worksheet](#)
3. Hold a 1:1 Transition Meeting with outgoing and incoming officer
  - a. [LINK to 3 Guiding Questions Document](#)
4. Shadow an exec/officer meeting (if possible)
5. Schedule a meeting with your organization's adviser
  - a. Get to know each other and your adviser's role
  - b. Discuss goals for your term
  - c. Set expectations of officer/adviser relationship
6. Meet with your new executive board as whole!
  - a. Team Building activities
  - b. Understanding each other's leadership style
  - c. Setting team and individual expectations
  - d. Creating goals for the year
    - i. [LINK to SMART Goals Activity Worksheet](#)
7. Accept your officer role in the Student Organization Database
8. Update Student Organization Database and Organization's Website
9. Complete required Student Organization Database Trainings
  - a. President – Presidents Training (required in Database)

Email [lscenter@iastate.edu](mailto:lscenter@iastate.edu) with any questions as you are going through this transition.



- b. Treasurer – COA Treasurer Training (required in Canvas) and Student Organization Marketplace Training (recommended in Database)
  - c. All Officers – How to Navigate the StuOrg Database (recommended in Database), University Event Authorization Training (recommended in Database), President’s Training (recommended in Database)
10. Identify important campus resources
- a. [SAC Resources for Student Organizations Page](#)
  - b. [Campus Orgs and Accounting](#)
  - c. [Event Management Office](#)
  - d. [MU Marketing and Graphics Department](#)

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