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 the CSAI for the upcoming year

Training Resources
- Student Organization Manual
- CSAI 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 CSAI

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
☐ CSAI 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

☑️ 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