Financial records (treasurer)
Status reports on current and continuing projects (president/committee chairs)
Evaluations of previous projects (president or secretary)
Meeting minutes and agendas (secretary)
Historical records of organization (president, secretary, or historian)
University handbooks

**Working with New Officers:**
Share effective leadership qualities and skills
Share problems and helpful ideas, procedures and recommendations
Go over reports containing traditions, ideas, completed projects, concerns, loose ends, ideas that came up that were never implemented
Go through organizational and personal files
Acquaint them with office surroundings
Meet together with the faculty advisor
Introduce them to important campus personnel

**Old/New Officer Retreats (held right before new officers take over):**
Hold the retreat in a get-a-way location, so participants won’t be distracted or disturbed.
Be sure to have food and beverages on hand.

Sample schedule:
- Icebreakers (advice and comments exercise)
- Evaluation of year’s events by outgoing officers
- Officer exchanges-pair up to distribute and discuss position responsibilities
- Goals examination/Report by outgoing officers

Old officers depart, leaving new officers to discuss the coming year:
- Icebreakers
- Policy, Constitution, Bylaws review
- Expectations of one another
- Theme/Mission development
- Review goals, formulate objectives, and create an action plan for each goal
- Budgeting
- Schedule events for the coming year
- Motivational closing

Content Compliments of North Dakota State University
OFFICER TRANSITION

The transition of leadership for your organization can be smooth or a complete disaster, and may determine the effectiveness of the group for years to come.

A Smooth Transition is:
The responsibility of both the outgoing and incoming members
A way to help the group avoid staring over or starting from scratch each year
A transfer of significant organizational knowledge
A sense of closure for the outgoing members
A utilization of the valuable contributions of experienced leaders
A time for the new leadership to absorb the expertise of the outgoing members
A great opportunity for outgoing leaders to evaluate the year
An orientation process for new leaders
The leadership changeover period
A time for incoming leaders to ask questions and outgoing leaders to give advice
An outgoing leader’s last chance to say “I wish I had done this…”

Specific Information to Give New Officers:
Constitution and Bylaws
Position descriptions of officers and membership
Description of committees
Resource or contact list of important people
Listing of basic annual procedures (reserving meeting rooms, requesting office/storage space in Hunt Union, etc)
Organizational member list
Calendar of annual events (rough estimate of what happens each month)
Philosophy, mission or purpose statement of organization
List of goals for organization
List of expectations of members
Handouts on appropriate topics (stress management, parliamentary procedure, etc)