

*Outgoing Officers Checklist*

**Prepare for and Host Elections**

* Review the organization’s constitution regarding election procedures, officer qualifications, etc.
* Set the nomination and election schedule and inform all members.
* Provide descriptions of all positions to all members.
* Set the election method in consultation with officers and members.
* Ensure fairness and transparency in the election process.
* Document election results in meeting minutes.

**Prepare Organization Materials\***

* Constitution and Bylaws
* Dates and Calendars
* Event Plans and Notes
* Contact Information (advisors, department contacts, vendors, etc.)
* Login Information (social media, email accounts, etc.)
* Organization Procedures

\* These and other documents should be stored in the organization’s Files via Eagle Engage page.

**Schedule and Prepare for a Transition Meeting**

* Schedule a meeting with your successor to review the duties of the position and offer insights.
* Review the items on the Transition Meeting Agenda and prepare notes or documents.

**Complete Projects and Tasks**

* Finish all ongoing projects or transition to new officers.
* Conclude ongoing correspondence and introduce the new officers.

**Budgets and Finances**

* Update budget documents
* Transition bank account and update EIN Responsible Party (if applicable).

**Update Eagle Engage**

* Use the organization’s “Officers” page in Eagle Engage to add new officers and remove outgoing officers (when appropriate).
* Determine who will submit the Re-Registration form via Eagle Engage (outgoing or incoming officer).

**Reflect On Your Experience**

* Complete the Outgoing Officer Reflection Worksheet.
* Add the officer role to your resume.
* Send Thank You cards for those who supported you in the role.

*For assistance and coaching, contact engagement@tntech.edu.*