

*Incoming Officers Checklist*

**Learn About the Organization**

* Review the organization’s constitution in full.
* Review the organization’s social media accounts, websites, and Eagle Engage page.
* Review available files, including meeting agendas, budgets, historical documents, etc.
* If applicable, learn about the national organization or governing body’s rules and requirements.

**Schedule and Prepare for a Transition Meeting**

* Schedule a meeting with your predecessor to review the duties of the position and gain insights.
* Review the items on the Transition Meeting Agenda and prepare notes.

**Learn About Student Organization Policies and Procedures**

* Review the Student Organization Officers Guide.
* Review available resources, including advertising and promotion, funding options, and more.
* Review the Officer Tools section of the Officers Guide to learn about goal-setting, running effective meetings, recruitment and retention, and more.

**Introduce Yourself**

* Schedule meetings with the organization’s advisor(s), with departmental personnel who support the organization, and other campus partners identified by the outgoing officers.
* Discuss roles, expectations, goals, and recommendations with these stakeholders.
* Email other contacts to let them know about your new role.

**Budgets and Finances**

* Transition bank account and update EIN Responsible Party (if applicable

**Update Eagle Engage**

* Ensure that new officers are added to the organization’s “Officers” page in Eagle Engage. Any current officer or Advisor can update Officers. Remove outgoing officers (when appropriate).
* Determine who will submit the Re-Registration form via Eagle Engage (outgoing or incoming officer).

**Get Started!**

* Complete the Incoming Officer Goals Worksheet.
* Schedule organization meetings, including general body meetings and executive officer meetings.
* Meet with other officers to determine roles, tasks, and expectations.

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