

TAKING OVER A STUDENT ORGANIZATION

A GUIDE AND HANDOFF SHEET

For incoming student organization officers



ABOUT THE EXAMPLE

The alumni-panel example uses fictional people and details.

YOU HAVE THE ROLE. NOW WHAT?

You have the role. Before you start planning the next event, find out what is already promised, what needs attention and what your team can actually decide.

Use this guide with an outgoing officer, your advisor or the person who manages student organizations on your campus. If nobody is available, start with the records you can access and keep a list of what is still unconfirmed.

What you will leave with

A short record of current work, confirmed access to the tools you need, and a first team meeting that ends with named responsibilities.

Start with the next deadline

What could go wrong before your next meeting? A registration deadline, unpaid invoice or promised speaker deserves attention before a new idea. Your campus and organization determine the actual rules.

BEFORE MAKING PROMISES

Your role

Read the current constitution, officer description and recognition requirements. Ask which decisions you can make, which need an executive-board or membership decision, and which require campus approval. Record where each answer came from.

Your decision?	Group decision?	Campus approval?
[Verified role or rule]	[Required process]	[Office or advisor]

Work already underway

Check the calendar, recent minutes and outstanding commitments. A room request is not a confirmed reservation. A proposed budget is not permission to spend. Label each item by its actual status.

People and access

Confirm who manages the organization email, files, roster, finances and event system. Request an authorized transfer of access. Do not put passwords, recovery codes or private complaints in a handoff document.

When the records are missing

Write down the missing item, the person or office that can help and your next contact date. Keep the gap visible. A confident guess can become a promise your team cannot keep.

[Source 1](#)

[Source 3](#)

A HANDOFF YOU CAN ACT ON

Scenario

The note you inherited

The alumni panel is basically ready. Ask the old president about it.

Example Record

Commitment	hold an alumni panel next month
Confirmed	two alumni accepted by email; messages are in the organization inbox
Not confirmed	room, accessibility arrangements and event approval
Next action	programming chair checks the campus event process with the advisor
Before promotion	confirm the room and approval status, then ask the speakers to verify the public details
Record location	Events / Alumni panel / Planning

Why this works

The new officer can separate a commitment from an assumption, find the evidence and identify the next person to contact. They do not need to reconstruct the entire event from a group chat.

Try the same check

Pick one live commitment from your own organization. Could another officer understand its status and take the next step from your notes alone? Ask them to read it and point out what is missing.

YOUR HANDOFF SHEET

Duplicate this page for each responsibility that needs a clear owner. Replace the prompts with your own information. Keep restricted records in the approved system, not in this template.

HANDOFF RECORD

Responsibility or commitment

What needs to continue, be completed or be closed?

Current status

What is confirmed? What is still pending?

Next action and owner

Who has agreed to do what, and by when?

Decision or approval needed

Who can decide? Where did you verify that?

Useful records

Add file locations and approved contact details. Check the incoming person can open them.

Unfinished questions

What still needs checking, with whom, and when?

MAKE THE FIRST TEAM MEETING USEFUL

Suggested agenda. Adjust the time and sequence to the size of your group.

1**First, check what is urgent**

Bring the live commitments and upcoming deadlines. Decide what needs immediate attention and what can wait. Invite corrections from the outgoing team or advisor.

2**Then, agree on responsibilities**

Ask each person about their availability before assigning work. Name an owner and a check-in date for each action. Agree how someone should flag a delay or ask for help.

3**Finally, test the handoff**

Have an incoming officer open the main files, locate the next deadline and explain the next action. Fix missing access or unclear notes while the people who can help are present.

4**End with a short record**

Send the agreed actions to the team. Separate decisions made from questions still open. Confirm when you will review progress.

KEEP IT USABLE AFTER TODAY

WORKING RECORD

Update the record when something changes

Add the decision, date and next action while the details are fresh. Remove obsolete instructions from the working view without destroying records your institution requires you to retain.

Record contribution honestly

When describing the experience later, distinguish what you personally did, what the team achieved and what is still underway. Keep approved examples of your work, with private information removed.

For advisors

Verify local registration, financial and access requirements. Ask the incoming team to demonstrate that they can find and use the records. This guide supplements your institution's procedures.

Sources

University of Northern Iowa, Student Organization Officer Transition Guide. Tennessee Tech University, Officer Transitions. University of Michigan, Student Organization Registration. Links below were checked on 2 October 2026. These are institutional practice sources, not evidence that this guide has been evaluated.

- [1. University of Northern Iowa Student Organization Officer Transition Guide](#)
- [2. Tennessee Tech University Officer Transitions](#)
- [3. University of Michigan Student Organization Registration](#)