VCU School of Medicine

Organization Name:

INCOMING OFFICER CHECKLIST

- ◯ Ensure you have access to all of the files, passwords, SIG constitution/ bylaws, websites, forms, financial records, previous meeting agendas and minutes, and any other resources necessary for success in the role.
- ◯ Meet with your SIG advisor(s) and ensure you are introduced to all key organizational partners and contacts.
- ☐ Meet with the outgoing officer to review materials, discuss responsibilities and upcoming projects/events, and ask about lessons learned.
- ☐ Ensure OME (i.e., Stephanie/Jasmine) has been notified of the new SIG leadership team and any other organizational change.
    - ◯ This should be completed by an executive officer.
- ☐ Review all the SIG resources, including but not limited to the SIG Handbook, SIG Finance Training, and SIG FAQ.
- ☐ Meet with other SIG officers to discuss the current state of the organization, learn each officer's role, and develop plans for the remainder of the academic year.
- ☐ Identify the tasks and responsibilities that require your immediate attention once you assume your office.
- ☐ Create three goals you hope to accomplish during your tenure.
- ☐ Write your own checklist item:
- ☐ Write your own checklist item:

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Name:
Position:
SIG Name:

INCOMING OFFICER WORKSHEET

Instructions: This worksheet is intended to support a smooth and successful leadership transition. Please use it to document your goals for the upcoming year, identify important contacts and resources, and note any questions you would like to discuss with the outgoing officer. Completing this worksheet will help you prepare for your new role and ensure continuity within the organization.

1) What are the primary responsibilities of your position?

2) Which officers, committee members, faculty/staff, or organizational partners will you work with in your role? What projects, events, or initiatives will you collaborate on together?

3) What tasks or responsibilities require your immediate attention once you assume your role?

VCU School of Medicine

INCOMING OFFICER WORKSHEET

4) What challenges did the outgoing officer encounter during their term? What strategies will you use to address or avoid similar challenges?

5) Are there any upcoming events, programs, or initiatives? If so, what stage of the planning process is your SIG currently in, and what steps are needed to ensure success?

6) What do you need to know about working effectively with your advisor(s)? Are there any expectations, communication preferences, or responsibilities you should be aware of?

VCU School of Medicine

INCOMING OFFICER WORKSHEET

7) What additional questions do you have for the outgoing officer?

8) List the contact information for key individuals and groups, including:

- Faculty Advisor(s):
- Staff Advisor(s):
- Organizational Partners:
- Vendors or Community Partners:
- Other Important Contacts:

9) List the login information for all important accounts, files, or resources you will need in your role, including:

- SIG Email:
- Social Media Accounts:
- Canva:
- Shared Drives/Cloud Storage:
- Any Other Important Resources:

Please save the password for all these resources in a secure manner.