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Organization Name:

OUTGOING OFFICER CHECKLIST

- [ ] Ensure that the incoming officer has access to all of the files, passwords, SIG constitution/bylaws, websites, forms, financial records, previous meeting agenda and minutes, and any other resources necessary for success in the role.
- [ ] Create or update a list of responsibilities for the incoming officer.
- [ ] Provide a timeline of upcoming events, socials, lunch lectures, and other key activities.
- [ ] Share contact information of important organizational partners, faculty, advisors, vendors and other resources.
    - ◯ If possible, make introductions to key contacts.
- [ ] Schedule a transition meeting with the incoming officer to review materials, discuss responsibilities and share lessons learned.
- [ ] Transfer any ongoing projects, outlining current status, upcoming deadlines, and next steps.
- [ ] Notify relevant stakeholders of the leadership transition, as needed.
- [ ] Answer any questions that the new officer may have and make yourself available for future questions, or direct them to someone who can help.
- [ ] Write your own checklist item:
- [ ] Write your own checklist item:

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Name:
Position:
SIG Name:

OUTGOING OFFICER WORKSHEET

Instructions: This worksheet is intended to support a smooth and successful leadership transition. Please reflect on your experiences and answer the questions below as thoroughly as possible. Your insights, recommendations, and lessons learned will help prepare the incoming officer to confidently step into the role and continue the organization's success.

1) What were the primary responsibilities of your position?

2) Which officers, committee members, faculty/staff, or organizational partners did you work with most frequently? What projects or initiatives did you collaborate on together?

3) What did you enjoy most about this position? What aspects were most challenging or least enjoyable?

VCU School of Medicine

OUTGOING OFFICER WORKSHEET

4) Describe any challenges, setbacks, or disappointments you encountered during your term. How did you address them? What would you recommend doing differently in the future?

Consider:
What strategies worked well?
What approaches were unsuccessful?
What opportunities or challenges should the next officer be aware of?

5) Looking back, what could you have done to make your experience or your organization's experience even better?

6) Who were the most helpful people, offices, or campus resources in helping you succeed? Please explain how they were helpful.

VCU School of Medicine

OUTGOING OFFICER WORKSHEET

7) What do you wish you had known before taking on this role?

8) What were your most significant accomplishments during your term? What contributed to their success? Are there any processes, events, or strategies that worked particularly well and should be continued?

9) What advice would you give the incoming officer? What should they prioritize, continue doing, avoid, or improve upon?

10) Is there anything else you would like your successor to know that would help them be successful in this role?

VCU School of Medicine

OUTGOING OFFICER WORKSHEET

11) Please provide contact information for key individuals and groups, including:

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

12) List any important accounts, files, or resources the incoming officer should have access to, including:

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

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