

ASCSU — Officer Transition Checklist

ASSOCIATED STUDENTS OF COLORADO STATE UNIVERSITY



This checklist serves as a guide for outgoing officers when creating their official transition report. Use it to ensure your report covers the key areas your successor will need to step into this role with confidence. Not every section will apply to every position; include what is relevant to yours.

1 | WELCOME LETTER

- Welcome letter included — introduce yourself, share what made this role meaningful, and include your personal contact info

2 | NOTIFY PARTNERS OF LEADERSHIP CHANGE

Identify all relevant organizations, offices, and partners that should be notified of the transition and introduced to incoming leadership. Include names and contact information.

- University offices
- External partners/community organizations
- State or national organization contacts
- Vendors / service providers
- Specific department administrator/informal advisor/prostaff

3 | DOCUMENTS TO PASS ON

List all position-specific documents and their purposes, ensuring their locations are documented on accessible shared drives (e.g., Teams) rather than personal ones.

- Position-specific project files
- Committee or working-group notes
- Role-specific legislation
- Login credentials for role-specific accounts and social media
- Physical items specific to this role (binders, materials, etc.)

4 | WEEKLY RESPONSIBILITIES

Describe what a typical week looks like in this role so your successor knows what to expect from day one.

- Recurring weekly meetings described (name, day/time, your role)
- Recurring weekly tasks described (reports, check-ins, standing deadlines)

5 | ACADEMIC YEAR CALENDAR

Outline the key deadlines, events, and responsibilities tied to this position for each quarter of the academic year.

Fall — Quarter 1

August · September · October

Key dates, deadlines, responsibilities...



Fall — Quarter 2

November · December

Key dates, deadlines, responsibilities...



Spring — Quarter 3

January · February · March

Key dates, deadlines, responsibilities...



Spring — Quarter 4

April · May

Key dates, deadlines, responsibilities...



6 | MAJOR RESPONSIBILITIES

Dedicate a section to each major responsibility of this position. Use the items below as a guide for what to cover for each one.

MAJOR RESPONSIBILITY

Name/Title

- Purpose — why this role owns this responsibility
- Background and context — history, prior decisions, things to know
- Key tasks and deliverables
- Recurring meetings — name, cadence, your role
- Relevant deadlines and specific dates
- Areas for improvement
- All program-related documents (e.g., schedules, major sign-ups, email templates, scripts, graphics, etc.)
- Words of wisdom for your successor

7 | CURRENT & ONGOING PROJECTS

Document any projects currently in progress so your successor can pick up where you left off.

PROJECT NAME

What is this project?

- Current status and next steps
- Upcoming deadlines
- Key contacts + collaborators
- Relevant files/documentation
- Copies of ongoing drafts of legislation

8 | HOW-TO GUIDES & ROLE-SPECIFIC TRAININGS

Provide step-by-step instructions for tasks unique to this role and list all required training or certifications needed to fulfill these duties (e.g., how to set up a meeting agenda, Kuali financial training, how to conduct an opinion rendering, etc.).

PROCESS/TRAINING 1

Name of role-specific process or training

- Step-by-step instructions included for processes
- List the specific point of contact/office and when completion is required for necessary trainings

9 | IMPORTANT CONTACTS

List the role-specific contacts your successor will need — people and offices they won't easily find elsewhere.

ROLE / CONTEXT

NAME

EMAIL / PHONE

e.g. State Budget Liaison

10 | OUTGOING OFFICER REFLECTION

Close with an honest reflection to help your successor hit the ground running.

- Biggest accomplishments this year
- Biggest challenges and how you handled them
- Budgetary considerations — anything more/less expensive than planned, any budgetary concerns that came up, etc.
- Top priorities to recommend for next year
- Final words of wisdom — anything you wish you had known on day one

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