Officer transition handoff

EXAMPLE

A filled-in sample of the first sections, so you can see the level of detail that helps. The blank document starts on the next page.

Environmental Club — CLUB

Treasurer — ROLE BEING HANDED OVER

2026-27 — SCHOOL YEAR

Tomas Herrera — OUTGOING OFFICER

therrera@example.org — EMAIL

Wed, Nov 18, 2026 — HANDOFF MEETING DATE

Grace Liu — INCOMING OFFICER

grace.liu@example.org — EMAIL

Ms. Alvarez — ADVISOR

1. Accounts and logins

Write where each password is kept, never the password itself.

Account or tool	What it's for	Login email or owner	Who has access now	Handed over?
Club Gmail	*Club email and Drive*	*rhs.envclub@example.org*	*Tomas, Ms. Alvarez*	*Yes, 11/18*
Instagram	*Event posts*	*rhs.envclub@example.org*	*Tomas, Priya*	*Yes, 11/18*
Google Forms sign-ups	*Event sign-ups*	*Club Gmail*	*All officers*	*Yes*
School activities account	*Spending requests*	*Ms. Alvarez (advisor)*	*Advisor only*	*n/a*
Cash box and key	*Bake sale cash*	*Room 214 cabinet*	*Tomas, Ms. Alvarez*	*At meeting*

2. People to know

Name	Role or organization	Phone or email	What they help with
Carmen Alvarez	*Advisor, Room 214*	*calvarez@example.org*	*Signs every spending request*
Dean Fowler	*Activities office*	*dfowler@example.org*	*Fundraiser approval, 2 weeks ahead*
Rosa Torres	*Northside Food Pantry*	*(619) 555-0142*	*Saturday sorting, max 12 students*
Parks permit desk	*City parks department*	*(619) 555-0190*	*Beach cleanup permit, 30 days ahead*

3. Money and rules

Balance, and on what date: *$412.60 on 11/15/26*

Where the money is held: *School activities account #2210 (no outside bank account)*

Who approves spending: *Ms. Alvarez signs, then the activities office*

How reimbursements work: *Receipt + form to the activities office within 30 days*

6. Notes for next year (one sample answer)

One thing I wish I'd known

Spending requests take about a week. Submit them the Monday before you need the money, not the Friday.

Officer transition handoff

Fill this in before you hand over the role, then go through it together in one meeting. Both of you sign the last page.
Never write passwords in this document. Write where they are kept (for example, with the advisor) and change them at the handoff.

CLUB | ROLE BEING HANDED OVER | SCHOOL YEAR

OUTGOING OFFICER | EMAIL | HANDOFF MEETING DATE

INCOMING OFFICER | EMAIL | ADVISOR

1. Accounts and logins

Email, social media, shared drives, sign-up forms, the school activities account, anything with a login or a key.

Account or tool	What it's for	Login email or owner	Who has access now	Handed over?

2. People to know

Advisor, activities office, custodians or room booking, partner organizations, vendors, last year's officers.

Name	Role or organization	Phone or email	What they help with

3. Money and rules

Balance, and on what date _____

Where the money is held _____

Who approves spending _____

How reimbursements work _____

Fundraising rules and limits _____

Outstanding bills or IOUs _____

Constitution or bylaws (where) _____

School requirements for the club _____

Member requirements _____

Officer duties not written anywhere _____

School requirements: registration deadline, minimum meetings or events, officer training. Member requirements: hours, attendance, anything else.

4. Events and deadlines

The things that happen every year, by month. Include the deadlines that sneak up (room bookings, permits, award applications).

Month	Event or deadline	Who to contact	Notes from this year
Aug			
Sep			
Oct			
Nov			
Dec			
Jan			
Feb			
Mar			
Apr			
May			

5. Records and files

Where everything lives and who can open it. Make sure the incoming officer can open each one before you sign.

What	Where it lives (link or location)	Who can open it
Member list		
Hours or attendance records		
Meeting notes		
Photos		
Shared folder or drive		
Templates and flyers		
Supplies (physical)		

6. Notes for next year

What worked and should keep going

What I'd change

Unfinished items (and who's waiting on them)

One thing I wish I'd known

7. Sign-off

We went through this document together, and the incoming officer can open every account and file listed.

OUTGOING OFFICER SIGNATURE

DATE

INCOMING OFFICER SIGNATURE

DATE

ADVISOR SIGNATURE

DATE