

# Student Organization Leader/Officer Transition Checklist

A thorough and intentional Leadership Transition plan will provide an organization with continuity so that next year's officers can build on the knowledge gained rather than starting from ground zero. Below are only suggestions, take pieces that work for your group.

## **Tips for a successful transition**

- Officer terms should provide at least one month of overlap so new officers have the opportunity to shadow and learn from the outgoing officers.
- When new officers have been elected, orient them together as a group with all of the outgoing officers. Include the organization's advisor in this process as well. Try going on a retreat together. This process provides the new leaders with an opportunity to understand each other's roles and to start building their leadership team. Outgoing officers should openly share what they believe went well and what they would change if they had it to do over again.
- Make introductions to resources. Schedule time to walk around campus with the new officers and introduce them to important people who can serve as key resources (Advisor, OSE office, etc.).
- Recognize your outgoing officers. Could be certificates, gifts, thank-you cards, etc. Show your group that leaders are valued and an important part of your organization.

## **The Basics**

- Introduce new officer(s) to the club advisor.
- Give contact information of all club leaders and advisor.
- Register your student organization with the Office of Student Engagement. This is done annually.
- Give access and instructions to any online platforms, such as:
  - Club Email
  - Member listserv
  - Facebook/Twitter, etc. accounts
  - Website/Blog
  - Online document storage (such as Dropbox or Google Drive)
  - National affiliation website login information/passwords
  - Any other communication tool your club may utilize
- If your club uses an OSE mailbox, remind to check at least once a week!
- If you transition officers AFTER you register your club, please fill out the Officer Update form found here: [Student Organization Update Form](#)
- Share the Student Organization Handbook with them, which can be found on Blackboard
- Explain how to reserve meeting/event space on campus for the year. Please reference the Student Organization Handbook for more information about how to do that.
- If you are affiliated with a national organization, explain this relationship and any important information associated.
- Finish all correspondence that you can and pass on any unfinished items to new officer.

## Share any and ALL documents

Sharing documents electronically allows new officers to easily update/change. Hard copy binders are an option as well, but harder to pass along to future leaders or edit documents. Google Drive and/or Dropbox are two popular online tools to help store documents online easily. Below are ideas of what to include:

- Mission, philosophy, goals and/or purpose of the organization
- Organization history
- Constitution/By-Laws
- Budgets/Financial reports
- Meeting minutes
- Agendas
- Any evaluations of events/programs
- Calendar of events and deadlines
- Officer position descriptions
- Committee position descriptions
- Organizational chart for organization
- Election process and timeline
- Membership recruitment information and timeline
- List of members and their contact information (e-mail, phone number).
- List of people expressing an interest but not joining/paying and their contact information
- If your club has dues, include the list of who has paid/not paid
- Membership application, if applicable
- Past Correspondence
  - E-mails to the chapter/organization
  - E-mails from the advisor with important information
- Special Events
  - Event planning guide/checklist for any past events or programs
  - Sample posters/flyers from past projects, old press releases, Event Approval process instructions, Event Planning Guide, Campus events contact list
  - Copies of all Chapter/Organization event materials (e.g., invitations, posters, awards, informative quarter sheets, etc.)
- Contacts
  - Office of Student Engagement
  - Professional contacts in the area
  - Chapter/Organization specific contacts
- Marketing
  - Logos (club logos, past events, etc.)
  - Any past print publications, press releases
  - Photos
  - Marketing/branding policy set by your club

## Finances

- Discuss the financial status of the organization
- Share where your organization receives money from
- If your club received student organization funding, share information and budget
- Get new leadership on as signers on your bank account and old leadership off--Hand over any online passwords.
- Discuss any fundraising plans or goals

- Pass along checkbook
- Documents to share: Budget spreadsheet, past student organization funding applications, any approved budgets

### **Introduce & Explain the Office of Student Engagement (OSE)**

Explain this office provides support and resources to all Student Organizations. Feel free to stop by our office in Kanbar 317 to introduce your new officer(s)!

- Become a Registered Student Organization
  - *All student organizations must register annually to become a recognized club.*
- Student Organization Funding
  - *Recognized Student Organizations can request funding from SGA.*
- Blackboard
  - *OSE hosts their online resources (such as this document) to help clubs be successful as well as many other resources and all things clubs!*
- Fall & Spring Involvement Fairs
  - *OSE hosts an Involvement Fair in August and January and clubs are invited to participate to recruit new members.*
- Photocopying
  - *All Recognized Student Organizations are eligible for free photocopying through the Office of Student Engagement. (There are limits to this privilege)*
- Large Program Request
  - *If you are hosting a large event on campus, you must meet with the Assistant Director of Student Engagement for Campus Activities. You must do this at least 4 weeks before your scheduled event.*
- Information
  - *Keep your contact information up to date with OSE to make sure you receive important updates and announcements.*

### **Pass along your wisdom!**

You may not see it as wisdom, but being in a position for a year (or whatever amount of time) is invaluable! You have learned important things along the way that can help future leaders. Mistakes, tips, tricks, ideas and successes are all important things to share. Think: What would you have wanted to know when you took office?

- Using the hindsight that you now have, identify the areas of responsibility, people, details, phone numbers, etc. that you wish someone had told you when you took office
- Review the organization's constitution, by-laws, written material, and goals and outline any areas needing attention or revision
- Culture of the group
- Tips of running an effective meeting
- Ideas for improvement
- Prepare an end-of-the-year report incorporating the organization's goals, activities, and accomplishments
- Recruitment ideas
- Fundraising ideas/projects
- Do not "drop off the face of the earth" - be available for consultation or questions

## **Reflections**

Another way to pass along your wisdom and also give outgoing leaders a chance to reflect on their year is to ask yourself these questions:

1. What was the best experience in this position?
2. What was the most difficult?
3. What tips could you give to make things smoother?
4. Name the administrators/staff you found helpful.
5. What collaborations were successful?
6. List any projects or ideas you were developing that you would like to see continue.
7. If you could do it all over again, what would you change?
8. Name two things you wished you knew when you started.

Another idea is to participate in a shared reflection time with the outgoing and incoming officers to set goals for the upcoming year, while reviewing the success of previous set goals. This allows new leadership to take ownership over the club and sets them on a track that is realistic as well as relevant to the organization.

## **Checklist of Suggested Tasks for Incoming Officers**

- Read Transition Binder (or online documents) and previous executive reports. Become familiar with the general history of the organization and its recent activities. Remember you need to know all of the little details as well as the big picture.
- Determine training and guidance you will need from the outgoing officers. Think of questions you have after reviewing the transition documents.
- Make appointments with key people.