**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 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, Student Involvement Suite/Rayburn Student Center, 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**

* Introduction with new officer(s) and advisor.
* Give contact information of all club leaders and advisor (optional if advisor approves) to new officer(s).
* Update your organization on ManeSync
* 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
* Share the Registered Student Organization Handbook with them. Found here: <http://www.tamuc.edu/campuslife/studentCenter/studentorganizations/images/Registered%20Student%20Organization%20Handbook-2017.pdf>
* Explain how to reserve meeting/event space on campus for the year. Please reference the Scheduling Office website here: <http://www.tamuc.edu/campuslife/studentCenter/schedulingOffice/schedulingInTheStudentCenter.aspx> .
* 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
* 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, Risk Assessments
  + Copies of all Chapter/Organization event materials (e.g., invitations, posters, awards, informative quarter sheets, etc.)
* Contacts
  + Activities & Engagement Office
  + 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 to Student Involvement Suite, walk through Scheduling space and who to go to with student organization questions about ManeSync, banking, SOAC, and scheduling space** Explain this office provides support and resources to all Student Organizations.

* Become a Registered Student Organization
* *All student organizations must register annually to become a recognized club. Your registration is valid until October 1st of every year. For example if you registered in August 2017 your registration is valid until Oct. 1st, 2018. You can update your club at any point during the year, however, registration must be completed prior to October 1st.*
* Student Organization Funding
* *If your club has funding, pass any information on to the new officer. If you do not have funding, but wish to apply, please contact the Graduate Assistant for Student Organizations, Christopher Robinson at* [*Christopher.Robinson@tamuc.edu*](mailto:Christopher.Robinson@tamuc.edu)*, or Assistant Director of SGA and Student Organizations, Jeremy Sippel at* [*Jeremy.Sippel@tamuc.edu*](mailto:Jeremy.Sippel@tamuc.edu)*.*
* Trainings
* *The Rayburn Student Center will offer trainings throughout the year and will post dates and times on their website.*

* Website
* *For questions about student organizations you can refer to* [*www.tamuc.edu/studentorganizations*](http://www.tamuc.edu/studentorganizations) *for resources. There are resources for SOAC funding, registration, Handbook, documents, event planning, etc.*
* Fall & Spring Involvement Fairs
* *There are two Student Organization Fairs, Mane Street, one the week after Labor Day in September and then one in January. All clubs are invited to participate to recruit new members.*
* Poster Service
* *Student Organizations can purchase posters and marketing through the PrideShop. This is the link for the Student Organization order form:* [*http://www.tamuc.edu/campuslife/studentCenter/prideShop/sso\_prideshoporderrequestform.aspx*](http://www.tamuc.edu/campuslife/studentCenter/prideShop/sso_prideshoporderrequestform.aspx)
* Mail
* *All clubs must have an on-campus mailing address; most clubs use their advisor’s campus address, however, if a student organization does not list their advisor’s address, then the mail will come to the Student Involvement Suite and the students will be responsible for coming to pick up their mail.*
* Information
* *Keep your contact information up to date on ManeSync 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.

Incoming Officer Worksheet

Position title:

List three ideas you would like to implement this year:

Can you foresee any problems during your term in this leadership position? What solutions can you suggest?

What goals or events from last year would you like to continue? How can you improve them?

Goals for Incoming Officer

Goals need to be SMART:

S-specific, significant, stretching

M-Measurable, meaningful, motivational

A-Attainable, Achievable, Acceptable, Action-Oriented

R-Realistic, Relevant, Reasonable, Rewarding, Results-Oriented

T-Time-based, timely, tangible, trackable

|  |  |  |  |
| --- | --- | --- | --- |
| Goal | Action Items | Necessary Resources | Projected Completion Date |
| Short Term Goal: |  |  |  |
| Short Term Goal: |  |  |  |
| Long Term Goal: |  |  |  |
| Long Term Goal: |  |  |  |
| Long Term Goal: |  |  |  |

Outgoing Officer Worksheet

Position title:

What I liked most about my position...

What I liked least about my position...

The most difficult decision I made was...

What I could have done to make the experience better...

Things that made it easier to complete my responsibilities...

What made it difficult to complete my responsibilities...

Things I wish I’d known before I took this position were...

*Information adapted from:*

*San Diego State University Office of Student Life & Leadership*

*University of Wisconsin-River Falls Office of Student Life*

*Montana State University Office of Activities and Engagement*

*St. Cloud State University*