**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. 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, Center for Student Involvement, 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 and meet with the club advisor(s)

 \_\_Give contact information of all club leaders and advisor(s)

 \_\_ Review the Club Resource Manual (http://sunyorange.edu/csi/docs/ClubResourceManual- Spring2016.pdf)

\_\_ Give access and instructions to any online platforms, such as:

 o Club Email

 o Facebook/Twitter, etc. accounts

 o Website/Blog

 o Online document storage (such as Google Drive)

 o Any other communication tool your club may utilize

\_\_Review the Constitution/Bylaws for the club and discuss any updates or changes that are needed

\_\_ Show new officers where the club mailbox is located in the Center for Student Involvement. **Remind them to check it at least once per week!**

\_\_Explain how to reserve meeting/event space on campus for the year. Please reference the Club Resource Manual for more information about how to do that.

**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

 \_\_Past Correspondence

 \_\_E-mails from the advisor or Center for Student Involvement with important information

\_\_Event planning guide/checklist for any past events or programs

\_\_Sample posters/flyers from past projects

\_\_Copies of all Chapter/Organization event materials (e.g., invitations, posters, awards, informative quarter sheets, etc.)

 \_\_Professional contacts in the area

\_\_ Marketing logos (club logos, past events, etc.)

\_\_Any past print publications, press releases

\_\_Photos

**Finances**

\_\_ Discuss the financial status of the organization

\_\_ Share where your organization receives money from

\_\_ If your club received funding from Student Senate, share information and budget

\_\_Discuss any fundraising plans or goals

\_\_Documents to share: Budget spreadsheet, past student organization funding applications, any approved budgets

**Introduce & Explain the Center for Student Involvement (CSI)**

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

 \_\_**Being a Registered Student Organization** All student organizations must register every semester to remain a recognized club. The required forms will be attached to the Student Senate budget request packet and placed in club mailboxes at the beginning of each semester.

\_\_ **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 Student Senate or CSI.

\_\_**Trip Requirements** There are specific forms with very specific deadlines that are required whenever a club plans a trip. Review the requirements in the Club Resource Manual and ask the CSI staff if you have any questions.

\_\_**COLT Night and ICC** Participation in COLT Night and Inter-Club Council (ICC) is required in order for a club to receive funding. They are also important opportunities to promote events, address concerns, share resources and learn ways to lead your club more effectively.

 **\_\_Trainings** The CSI will offer trainings throughout the year and will post dates and times in the club mailboxes.

\_\_ **Website** CSI is building their online resources (such as this document) to help clubs be successful as well as many other resources and all things clubs! http://sunyorange.edu/csi/

**\_\_ Fall & Spring Club Fairs** CSI hosts a Club Fair in September and January and all clubs are encouraged to participate to recruit new members.

**\_\_Poster Service** All recognized Student Organizations are eligible for the free poster service through the Center for Student Involvement. Clubs can request to have color flyers and a limited number of large, full-color posters for their upcoming events.

**\_\_Club Mailboxes** All clubs have an on-campus mailbox located in the CSI and should check it at least once a week.

**\_\_ Information** Keep your contact information up to date with CSI 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

 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 at least two things you wished you knew when you started.

Incorporate these into a meeting with the incoming officer taking over your position. As an alternative, write them a letter including your answers to these questions. It can be a great tool to encourage and inspire the next generation of club officers.

**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 (outgoing officers, advisors, CSI)