

Twelve Transition Tips:

A Checklist for Student Organizations

If you plan ahead for events & meetings to ensure the success of your organization, why wouldn't you do the same for the group's future leadership? Transition training is the key to your organization's survival from year to year. It is the responsibility of the outgoing & incoming officers to ensure this transition occurs long before the outgoing officers depart. Strong organizations are often created by a core group of members; with a proper transition, all the work & dedication will not be lost, & your organization will continue to thrive on campus.

☐ Ensure new officers know how to register your student organization

Forms are available on-line at www.orgsync.com by selecting SGA on the left menu → Forms→Student Organization Registration. It includes your roster, constitution, advisor agreement, and much more.

☐ Share files and create a binder related to your position and organization

What? You don't keep any files? Written information and computer copies of files are very helpful if the outgoing officer graduates or moves on to a different role on campus. **Keep a binder in a central location that officers can access or have a binder specific to each officer.** Discuss with your organization advisor(s) if they can store copies of all important files and perhaps an operations manual with important information about your organization.

Make sure the incoming officer has a copy of the following items, preferably all in one location:

- Copy of Constitution and By-laws
- Mission, philosophy, goals and purpose of organization
- Position description of officers and members (should be contained in your constitution)
- List of committees and their description (should be contained in your constitution)
- Member & officer contact list, access to any email mailing lists
- Meeting minutes and agendas
- Contact information of important people/offices on campus
- Financial records and information about your agency account
- List of basic annual procedures and/or calendar of annual events
- Web page/ Facebook information. How do you maintain the site? How do you use OrgSync?
- Any historical records of the organization

☐ Set up a meeting and/or plan a retreat

- Don't just drop off a binder and leave a note that says, "Good luck!" Make sure that the outgoing and incoming officers meet together and discuss all of these issues and answer questions.
- Retreats are a fun way to train new officers. Topics to consider on a retreat include: goal setting, idea brainstorming, event planning, group development, and direction of the organization.

☐ **Review a calendar of the year**

- Take out a calendar of this school year and review it together. What were the busy times? What kinds of things should the new officer anticipate? You may not remember everything you did, but looking at your calendar may jog your memory and help you pass on some tips.

☐ **Review past and future organization events**

- Which events were successful this year? Which should be continued?
- When should the planning start?
- Which events didn't go well? Should they be revamped and tried again or just dropped?
- Were there any pitfalls or things that could have been improved?

☐ **Recruitment activities**

- What recruitment activities were done? What worked? What didn't work?
- Why did new members stick around? If they didn't – what made them leave?
- A great way to recruit new members is at Campus Involvement Fair in the beginning of the semester. *An OrgSync registration form will be sent to all organization presidents prior to the beginning of the semester.*

☐ **Review budgets and funding. Review Your Agency Account!**

- What is the financial status of the organization?
- Where did the organization get money from this year?
- Did the organization apply for SGA Student Activity Fee funding and/or receive funding?
- What is Student Activity Fee funding and how can they apply? (SGA)
- Which fundraisers worked – which didn't?

☐ **Make introductions to resources**

- Schedule time to stop in SDCA together so the outgoing officer can make introductions to the important people who can serve as resources to the incoming officer.
- Make sure new officers meet with the organization advisor as well.

☐ **Next Steps – create a “To Do” list**

- Work together to make a list of “things to do” for the incoming officer. Which items need their attention now? Make this list together so the outgoing officer can help with direction. Be sure to trade contact information so that the outgoing officer can be a resource in the year ahead.

☐ **Book Meeting Rooms and Dates**

- Where were meetings held? What worked? What didn't?
- Be sure to have **confirmed** space for your meetings.
- Has a summer contact list been created for the organization?

FYI: Classrooms cannot be booked until semester classes have been scheduled. This typically takes place two – three weeks after the semester begins.

☐ **Ensure incoming officers know they need to attend Fall Officer Training**

- As a registered student organization, you have numerous benefits available to you, but also responsibilities. Fall Officer Training (and Spring Membership Training) are

typically available in the beginning of the semester which will cover resources, tips, and training for your executive board (and general members in the spring semester).

☐ Consider using OrgSync to streamline communication

- OrgSync (www.orgsync.com) is an online management tool available to student organizations. It contains an electronic membership roster, calendar, event scheduler, online forms/files, polls, announcements, involvement tracking, to-do lists, and much more. If you would like a training session for your organization or executive members, please contact SDCA