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 to allow new officers the opportunity to shadow and learn from the outgoing officers.
- When new officers have been elected, orient them together as a group with all 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, Office of Student Engagement, 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 and opens up in August of each academic year.
- Give access and instructions to any online platforms, such as:
  - Club Email
  - Member/Club 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 a SUB mailbox, give combination and show where they are (Lower level of SUB near Leadership Institute). Remind to check at least once a week! Give them a copy of the SUB mailbox policy.
- If your club uses a club locker, give combination and show where they are (3rd Floor Landing of SUB). Give them a copy of the locker policy.
- If you transition officers AFTER you register your club, please fill out the Officer Update form found here: [http://www.montana.edu/engagement/organizations/registration.html](http://www.montana.edu/engagement/organizations/registration.html)
- Share the Registered Student Organization Policies with them. Found here: [http://www.montana.edu/engagement/organizations/policies.html](http://www.montana.edu/engagement/organizations/policies.html)
- Explain how to reserve meeting/event space on campus for the year. Please reference the Registered Student Organization Policies 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 may be relevant 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
  - OSE 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
- Discuss any businesses or individuals who have given donations or sponsorships in the past.
- 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 222 SUB to introduce your new officer(s)!

☐ Become a Registered Student Organization
   All student organizations must register annually to become a recognized club. Your registration is valid until Sept. 30th of every year. For example, if you registered in August 2016, your registration is valid until Sept. 30th, 2017. You can register your club at any point during the year, however, recommend to register before Sept. 30th.

☐ 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 OSE.

☐ Trainings
   The OSE will offer trainings throughout the year and will post dates and times on their website as well as announce in Club News.

☐ Website
   OSE is building their online resources (such as this document) to help clubs be successful as well as many other resources and all things clubs! www.montana.edu/engagement

☐ Catapalooza
   OSE hosts Catapalooza the Thursday/Friday before Fall semester starts. Registration opens in April.
   www.montana.edu/catapalooza

☐ Fall & Spring Involvement Fairs
   OSE hosts an Involvement Fair in September and January and all clubs are invited to participate to recruit new members.

☐ Club News
   Clubs News is an e-newsletter put out by OSE to inform clubs of important updates and other activities going on that may be of interest. Please read these emails and forward on to other leadership or members as you see necessary.

☐ Poster Service
   All Registered Student Organizations are eligible for the free poster delivery service through the Office of Activities and Engagement. During the academic year, they will distribute your poster for recruitment, an upcoming event or program, etc. throughout campus. They only do this once a week. Visit their website for the poster policy and weekly deadline.

☐ Outdoor Program Request
   If you are hosting an event outside on campus, you must submit an Outdoor Program Request through the OSE website for approval. You must do this at least 2 weeks before your scheduled event.
   http://www.montana.edu/engagement/outdoor-program-request/

☐ SUB Mailboxes
   All clubs must have an on-campus mailing address. Most clubs use their advisor’s campus address, however, student organization mailboxes are available in the SUB upon request.

☐ Storage Space
   Limited club locker space is available for club use upon request.

☐ Sandwich Boards
   Registered Student Organizations are eligible to check-out sandwich boards to help advertise your event, club or program. Contact the OSE to reserve.

☐ SUB Room Reservations and A/V Equipment
   Registered Student Organizations are eligible to reserve spaces in the SUB, free of charge. OSE has laptops, projectors, and other A/V equipment available for check out.

☐ Club Incentive Program
   Your club is able earn points from various workshops, leadership training, volunteer experiences, and more.

☐ Information
   Keep your contact information up to date with this office 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 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 was the biggest surprise?
4. What tips could you give to make things smoother?
5. What areas need the most support/attention within our group? Ideas to improve in these areas?
6. What barriers did the group face?
7. Name the administrators/staff you found helpful.
8. What collaborations were successful?
9. List any projects or ideas you were developing that you would like to see continue.
10. If you could do it all over again, what would you change?
11. 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 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.
- Review this document and identify key information you need to collect from outgoing leaders.
- Make appointments with key people.

Information adapted from:
San Diego State University Office of Student Life & Leadership, University of Wisconsin-River Falls Office of Student Life
Activity:

In what ways does your organization transition leadership well?

*Example:* We host elections in February and have a “President-Elect” position so the incoming leader can shadow and learn from the outgoing leader.

1. ____________________________________________________________________________
2. ____________________________________________________________________________
3. ____________________________________________________________________________
4. ____________________________________________________________________________
5. ____________________________________________________________________________
6. ____________________________________________________________________________

In what ways does your organization fall short in how you transition leadership?

*Example:* We do not have a transition binder or file in place.

1. ____________________________________________________________________________
2. ____________________________________________________________________________
3. ____________________________________________________________________________
4. ____________________________________________________________________________
5. ____________________________________________________________________________
6. ____________________________________________________________________________
Action Steps:

Three ways you plan to hand off your “prouds” to continue into the future with new leadership:

1. ________________________________________________________________
2. ________________________________________________________________
3. ________________________________________________________________

Three ways you plan to improve your “sorry’s” (how to communicate as well as offer solution ideas) to future leadership:

1. ________________________________________________________________
2. ________________________________________________________________
3. ________________________________________________________________

NOTES:

Questions?
Office of Student Engagement, 222 SUB, 994-6902 or studentorgs@montana.edu,
www.montana.edu/engagement
MSU Leadership Institute, 187 SUB, 994-7275, leadershipinstitute@montana.edu,
www.montana.edu/leadership