

Leadership Transition Checklist

Every year unsuccessful leadership transitions hamper future successes of student groups at the University of Rochester. This year please remember that a successful transition is not only the glue that will hold your organizations together from year-to-year but also the fuel that continues to propel them in a forward direction. The good news is that a successful transition is neither difficult nor very time-consuming. Please remember that *all* the following tips may not pertain to your group, but most are relevant and important for the majority of student groups.

For a successful transition, below is a list of responsibilities for Outgoing Officers:

■ **Be sure to review all of the following information with incoming officers:**

- Your organization's history
- University of Rochester's Policies and procedures
- Your organization's constitution, mission statement, and officer responsibilities (if the old things need updating, now is a great time to do that!)
- Review and pass on old records (including meeting agendas and minutes), binder(s), files, notebooks, copies of documents used for advertising past events, and correspondence (Pass along everything you got!)
- Officer job descriptions and written expectations for each new officer regarding their role and responsibilities (offer advice on past successes and mistakes)
- Your organization's calendar (and any important annual events that non-exec board members might not know about, i.e. leadership training events and/or budget and bill deadlines)
- Your organization's status reports on continuing projects. In relation, please be sure to finish any unfinished business (especially monetary), and if the business cannot be finished, please be sure to inform new officers—with specific detail—what has been left unfinished
- Your organization's annual budget, evaluations for projects and events, achievements, and mistakes
- Review important contacts used for past and are using for future events

■ **Be sure to remember the following:**

- Update letterhead
- Pass on membership lists, mailing lists, computer passwords, phone passwords, accounts, contracts, keys, addresses, phone numbers, emails etc...
- Recruit new officers as early as possible. The earlier transition begins the less likely it will be forgotten at the end of the year. If time allows, offer time for your new officers to shadow you and work with you to lead the last projects and group meetings
- Give the Student Activities Office any keys that outgoing leaders may have to their group's student office.
- Sit with your incoming officers and help them plan their first courses of action over their first few months

■ **Be sure to DO the following:**

- Pass along a copy of the Campus Club Connection group page with instructions on how to update board members and general members and Instructions on how to transfer over ownership of email lists and websites
- Introduce officer to key contact people, especially your group's advisor(s) & any relevant supervising staff
- Explain officer role in organization and meetings
- Don't be afraid to make a group event out of the "changing of the guard" (this can be as simple as a recognition to outgoing and incoming group members at your last meeting, or as formal as a dinner celebration/party to energize the group on your upcoming year, events, and leadership)

Transition responsibilities for Incoming Officers:

■ Be sure to do ALL of the following:

- Renew organization and/or attending mandatory meetings to access funds
- Understand present and future programs
- Develop a master calendar with meetings, programs, and events
- Develop a webpage and/or update current webpage with new officer information (including Campus Club Connection)
- Establish meeting agendas, meeting times, and locations (you can reserve meeting locations up to a year ahead of time)
- Remember to keep well organized and detailed records in the upcoming year so it will be easy to transition when you recruit and train new leadership
- Begin recruiting and training promising group leaders as early as possible; offer time for your new officers to shadow you and work with you to lead the last projects and group meetings
- Evaluate with outgoing officers last year's concerns, achievements, and past goals
- Establish new goals and prioritize
- Plan group goal setting at next meeting
- Try to arrange for new officers to keep in contact over the summer break (if a meeting—in person, online, or over the phone—is possible, it is worth beginning planning as early as possible for the upcoming academic year)
- Utilize Wilson Commons Student Activities resources
- Encourage new officers to attend fall leadership training

Below there has been included a list of questions and exercises that are important to think about while training new leadership. It may be helpful to actually write answers to these questions to give to your incoming officers.

Items for Your Group's Leadership Notebook

- 1) What was your best experience in this position?
- 2) What tips could you give your successor to make things smoother for next year?
- 3) Name the administrators/staff you found to be helpful in your position.
- 4) What did you find most difficult in this position?
- 5) What was the best resource you used in this position?
- 6) Which offices/departments/student groups did you co-sponsor with that worked well?
- 7) Please list any projects or ideas you were developing that you would like to see continue.
- 8) Name one thing you wished you knew when you started the position.
- 9) Do you think the student body knows of your position and the services your group provides?