

Leaderships Transitions

Remember a successful executive board is not only the glue that holds your organization together but also the fuel that propels it in a forward direction. A successful officer transition is neither difficult nor very time-consuming, however if you don't do it or do it wrong your organization can struggle.

Leadership Transition Checklist

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 these need updating, now is a great time to do that!)
 - Old records (including meeting agendas and minutes), binder(s), files, notebooks, copies of documents used for advertising past events, and correspondence (**upload what you can to CCC**)
 - Officer job descriptions and expectations for each new officer regarding the role and responsibilities, verbally share advice on past successes and mistakes (**upload what you can to CCC**)
 - Your organization's calendar (and any important annual events that non-executive board members might not know about, such as leadership training events and/or budget and bill deadlines)
 - Forward on reservation confirmations for meetings and programs
 - Your organization's status reports on continuing projects (inform new officers—with specific detail—any organizational responsibilities that will be left unfinished at the end of the year)
 - Your organization's annual budget, evaluations for projects and events, achievements, and mistakes
 - Important contacts used for past and future events
- *Be sure to do the following:*
 - Transfer ownership on membership lists, mailing lists, account passwords (social media, website, email, bank), contracts, addresses, phone numbers, etc.
 - Sit with your incoming officers and help them plan their first courses of action over their first few months
 - Give them access to the Campus Community Connection (CCC) group page with instructions on how to update executive board members and general members
 - Introduce officer to key contact people, especially your group's advisor(s) and any relevant supervising staff

Responsibilities for **INCOMING OFFICERS**:

- Renew organization and/or attend mandatory meetings to access funds
- Understand present and future programs
- Develop a master calendar with meetings, programs, and events
- Update Campus Community Connection (CCC) presence and webpage (if applicable) with new officer information
- Update your Virtual EMS contact so you can reserve rooms
- Attend a Community Kitchen training if you do programs in that space.
- Establish meeting agendas, times, and locations
- 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
- Work with outgoing officers to review last year's concerns, achievements, and goals
- Establish new goals and prioritize them

- Attend fall and mid-year leadership training
- Bookmark the Wilson Commons Student Activities and SA government website AND know your key resources there
- Review past Activity Reflections, Student Organization Annual Report (SOAR) evaluation letters, budgets, and financial statements

Great questions to get the transitional meeting started

- 1) What was your best experience in this position?
- 2) What are you most nervous about going into this position?
- 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?