



Transition Document Tips for SOAR

What is a transition document?

A transition document serves as a crucial resource for newly elected officers, ensuring a smooth and effective transition of the executive board. It should clearly outline the responsibilities associated with each officer position, and provide guidance on how to fulfill these duties. The document may be a comprehensive guide covering all officer roles or a series of individual documents dedicated to each position. The primary purpose of a transition document is to aid in the transition process by explaining the operational framework of the executive board within the organization.

For example, your organization may want to include position descriptions and expectations for each officer regarding their roles and responsibilities. Or, a list of resources that may be helpful when onboarding newly elected officers. For example, usernames and passwords for social media or email accounts, a list of staff or faculty the position should meet with, or a document which links websites or forms that are helpful to the position.

Note, if your organization does not upload a transition document for SOAR, it will impact your organization's overall score. A transition document is different from a shadow period. Your organization needs to have both transition document(s) and a shadow period to receive full credit.

For a successful transition period, you may refer to the [Leadership Transitions website](#).

Below are examples of responsibilities which may be included in transition documents. Additionally, at the end of this document are examples provided by organizations in the past who have received full credit towards SOAR.

Bulleted Examples

President

- Attend leadership trainings (e.g., Fall and Mid-Year Leadership Training). Fall Leadership Training is typically before the first day of classes in August. Mid-Year Leadership Training is typically held before the first day of classes in January.
- Maintain organization within the club.
- Oversee all executive board positions to ensure completion of their responsibilities and support them when needed.

- Communicate with other executive board members, especially those outside of the organization to maintain a healthy relationship with other organizations.
- Make sure the incoming executive board is transitioned into their roles successfully. Offer support, as needed. Delegate/Ask for support from other executive board members to support successful transitions.
- Keeps in contact with the organization's assigned advisor, department contacts, advocates, coaches, and faculty advisors; if applicable.

Business Manager

- Save this link: <https://sa.rochester.edu/sa/business-manager-tools/>. This website includes all of the Business Manager Tools provided by the Students' Association Appropriations Committee (SAAC); including training that must be completed in order for our organization to be able to transact.
- Attend either the Fall Leadership Training Business Manager Training held before the first day of classes in August.
 - If you joined our organization after the Fall Leadership Training session, you will need to attend the training held during Mid-Year Leadership Training before the first day of classes in January.
- Submit a budget for the next academic year each spring. Be on the lookout for communications from our student accountant and Wilson Commons Student Activities.
- Familiarize yourself with the Business Manager Manual.
- Familiarize yourself with the Financial Transaction Request (Green Form). Complete the form for every organization transaction.
- Request supplemental funding (maximum 2 requests and up to \$4000 per academic year), as needed.

Organization Example One: Position Specific

Secretary: facilitate communication between officers, Take meeting minutes, Help with PR.

Weekly Duties

(These are potentially your most crucial roles. The weekly meeting is organized by you!)

- Send out the reminder email for the weekly e-board meeting.
 - Typically sent out the day before.
- Create the meeting minutes document (There will be a template in the minutes folder), share this in a reminder email. If someone needs to attend remotely for whatever reason create a zoom link and share this as well.
- Attend the e-board meeting, take minutes during the meeting.

Event Related Duties

- Book rooms for meetings and events.
- Create fliers for upcoming events, and be in charge of distribution. Flyer files can be emailed to the Campus Information Center (cic@rochester.edu) for printing. You have to go there to get the print card.
 - Any application is fine, but some suggestions would be Adobe Express or Canva (both free).
- Promote events/Post fliers on social media. We can get you the Instagram login.
- Help with any designated tasks (things run smoothly if you are willing to take on some work). You don't have a ton of strictly secretarial duties, so it's important to be available to help the other e-board members.
- Facilitates elections: (shared with President)
 - Create a nomination form to be sent out in CCC.
 - Notify nominees and allow time for nomination acceptance.
 - Send out the election form (only with people who have accepted).
- Facilitate any e-board transitions:
 - Ensure transition documents are up to date.
 - Introduce new e-board members, schedule a transition meeting with them and the person they are replacing and be there for assistance

Booking Spaces for Meetings and Events

- You are the organization's VEMS contact and are in charge of booking rooms for eboard meetings and club events.
- Fill out the VEMS contact form to get EMS access transferred to you.
- Information on VEMS:
<https://rochester.edu/college/wcsa/event-planning/advanced-reservations.html>
 - Typically eboard meetings are held in CSB 523, and events are held in CSB 601 or CSB 209.

- CSB 209 can be booked through VEMS.
- Reservations in VEMS need to be booked **at least 4 days in advance**.
- CSB 601 and CSB 523 are not listed in VEMS and can be reserved through the department. Email department at least a few days in advance. The earlier the better.

Staff and Training

- There is no training or staff for your department!
- Pay attention to emails from WCSA about student leadership trainings or other important information.
- It's helpful to get to know Adobe Express (in Adobe Creative Cloud) or Canva for making fliers or preferred application

Associated Departments

- You work with all of the officers and the department to get most of your tasks done.
 - Professors X and Y are the main contacts to work with about scheduling events, distributing posters, and raising awareness for our organization's things.

Common Events

- Jeopardy
- Internship Nights
- Guest Speakers
- Study Breaks
- Convention (in the fall)

Common Budget Needs

- N/A

The Secret(s) of Success

- Get a free Adobe Express or Canva account. It makes making fliers incredibly easy.
- Set up a group chat with all of the officers. It will make communication extremely fast.
- Learn how to navigate CCC.
- Learn ins and outs of Google Docs; you can add comments to meeting notes, tag people on action items, etc.
- Be the networker. Talk to non-eboard members, get more people involved!

Organization Example Two: All Positions

**University of Rochester
Organization ABC
Transition Document
Written by Spring/Fall 23 E-board Members**

I. E-Board Responsibilities

A. General Ethics

1. Always communicate clearly within the whole E-board team. This includes actively responding to other members (i.e, message, email, face-to-face discussion, etc.) and updating task progress.
2. Always respect each other regardless of position or age.
3. Be responsible as a team and as an individual. Any unexpected and unintentional risks should be resolved and shared by all E-board members.
4. Be present as much as possible, even when there are no solid tasks within your responsibilities.
5. Plan ahead of time - review all administration deadlines and event planning processes to ensure a smooth and punctual organization operation.

B. Positions and Duties of Officers (The number of positions may vary every year)

1. President: The President serves as a representative of ABC, welcomes each individual or group interested in ABC activities or ABC cultures, and actively outreaches to other individuals or organizations to promote the clubs' events. The President shall also maintain communications between E-board members, understand all necessary operations and resources, initiate planning ahead of time, and make the final calls to important decisions.
2. Business Manager: The Business Manager manages all budget and fundings of ABC including the annual budget, budget approval before each event, and detailed budget planning during events preparation. The Business Manager shall work closely with the SAAC (budget approving committees) and SOFO (budget handouts and orders) to keep track of budget spent and received by ABC. Training shall be provided for the Business Manager to utilize resources and tools available on campus.
3. Event Manager: The Event Manager directs the event ideas, plans, and operations. These include preparing event ideas ahead of E-board meetings, collecting ideas from other E-board members and committees, finalizing the processes to be completed, registering space and events, and ensuring the events run smoothly. While not explicitly assigned during E-board appointment, Co-Event Managers are expected to collaborate and determine

their respective roles in managing the following 2 fields: Logistic and Culinary.

4. Publicity Manager: The Publicity Manager shall be responsible for external relationships of the club, outreaching to other organizations, managing the publicizing process for all ABC sponsored events, and taking photos for each event. The Publicity Manager manages all designs, social media postings and timelines, and invitation emails. The tasks require creativity in promoting the events under any social media or physical platforms to make sure ABC works are well presented and welcoming.
5. Secretary: The Secretary shall take roll calls and minutes at meetings, tally votes, keep an accurate list of organization members, and send out emails to all members. The Secretary is responsible for maintaining and updating the ABC website and CCC page. The Secretary shall maintain a current copy of the constitution open to inspection by all members of the organization and the Student Government.

II. Notable Operations

A. Space Reservation

1. Timeline: All events shall be registered at the beginning of each semester based on WCSA reservation timelines.
2. Responsibility: Event Managers, Secretary
3. Tool: Virtual EMS
 - a) An Event manager shall be registered as the VEMS contact.
 - b) VEMS shall always be registered and checked by two E-board members.
 - c) Upload all email confirmation to ABC Drive.
 - d) Check VEMS reservation 2-3 days before the event. Email wcsa@rochester.edu if the reservation is not posted correctly.

B. Community Kitchen Training

1. Timeline: After each E-board election
2. Responsibility: President, Event Managers
3. Form: Community Kitchen Training form
 - a) Training is licensed for 1 year.
 - b) Training dates are limited and are often scheduled during school hours. Make sure to schedule and attend training as soon as possible.

C. Event Planning

1. Timeline: 14-28 days in advance
2. Responsibility: All E-board Members
3. Process:
 - a) Schedule in-person weekly E-board Meeting.
 - b) Draft ideas and general timeline → Secretary takes meeting notes.
 - c) Distribute tasks among E-board members.

D. CCC Registration

1. Timeline: 4/14/30 days registration timeline
2. Responsibility: Event Manager, contact Advisor if needed
3. Form: CCC Register form (CCC → Create Event)
 - a) Mark “Food Provided” if true.
 - b) Mark “Access & Display Option” accurately.
 - c) Make sure the number of attendees matches room capacity.
 - d) Register for advertisements with posters ready.
 - e) Register for ECM equipment if needed.
 - f) Upload PDF form to Drive.
4. If registration is shorter than WCSA requirement:
 - a) Fill out Exception Request.
 - b) Check CCC Workflow and contact people from the appropriate department.

E. Supply Request

1. Timeline: At least 14 days in advance
2. Responsibility: Event Managers
3. Process:
 - a) Check available resources on the WCSA resource website.
 - b) Submit Supply Request Form.
 - c) Pick up supplies a day before the event and store them in the ABC locker (Ruth Merrill Center).
 - d) Return unused supplies to WCSA after the event concludes.

F. Budget Planning

1. Timeline: 10-14 days in advance
2. Responsibility: Business Manager, contact advisor/SOFO/student accountant if needed.
3. Process:
 - a) Coordinate with Event Managers to create Excel budget sheet
 - b) Submit Virtual Green Form with the appropriate category, upload a budget sheet.
 - c) Follow SOFO guidelines to make transactions.
 - d) Save complete form as PDF and upload form to ABC Google Drive.

G. Communication

1. Timeline: Throughout semester
2. Responsibility: Secretary
3. Tool: CCC Email
 - a) Regularly update the mailing list with new members and contacts.
 - b) Create email to communicate ABC events to members and contacts.

H. Advertisement

1. Timeline: 1-7 days in advance

2. Responsibility: Publicity Manager
3. Process:
 - a) Register for WCSA digital poster in CCC Registration Form.
 - b) Design posters and social media postings, including infographics and official event posters.
 - c) Print and attach event flyers around campus spaces.
 - d) Take photos during event to create future promotional material.

I. Printing

1. Responsibility: Publicity Manager, Event Managers
2. Process:
 - a) Store necessary printing files in ABC Google Drive.
 - b) Open access and send email to WCSA.
 - c) Arrive at the Campus Information Center (Wilson Commons 2nd floor) to pick up ABC printing card.
 - d) Print materials in Ruth Merrill Center (Wilson Commons 1st floor) and return printing card after usage.

III. Resources

A. Contacts:

1. Advisor: XYZ
 - a) Schedule advisor meeting at the beginning of each semester.
 - b) Communicate with advisor regularly to discuss event plans, regulations, and timelines.
2. WCSA:
 - a) Finish all required training announced by WCSA.
 - b) Pay attention to WCSA monthly newsletter (Student Organization Insider) for to-do tasks.
3. Financing activities:
 - a) SAAC: Handle budget approval (i.e, Budget, Supplemental Funding).
 - b) SOFO: Handle purchasing process.
 - c) Student Accountant: Point of contact for financing issues.
4. Other organizations:
 - a) Keep in mind possible collaborations. Reply with kind words even in the event of declining collaborations.
 - b) BIC, ISO, and DEI are notable departments with promotional and budget support for cultural organizations.

B. Space reservations:

1. Reservation Coordinators (VEMS): Point of contact for resolving space reservations issues.
2. Building managers: Point of contact for accessing Community Kitchen

C. Forms and notable deadlines:

1. All forms can be found in the following link:
<https://ccc.rochester.edu/wcsa/forms/>
2. Leadership training attendance: Beginning of Fall and Spring semesters.

D. Business Manager Training:

1. After leadership training sessions; Fall and Spring.
2. Required to transact with SOFO.

E. Annual budget submission:

1. Submission period: March.
2. Watch out for WCSA email and SAAC website.

F. Title IX Training:

1. Emailed to each officer during the beginning of the Fall semester.
2. Failure to complete training will result in suspension of VEMS.
3. President shall make sure all officers complete their Title IX Training on-time.

G. In house keeping:

1. Update "Transition Document" file every year. Always maintain proper and professional transition. Make sure all links are updated and accurate.
2. Update "ABC contact/login info" and "Eboard Contact" files every year.