

# Student Organization Officer Transition Guide

A thorough and intentional Leadership Transition plan will provide an organization with continuity so that the next set of 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

- Utilize this Transition Guide the Transition Timeline at the end of this guide!**
- Give potential 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 of the outgoing officers. Include the organization's advisor in this process as well. Try getting together for lunch or dinner. 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 could 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, Student Activities, etc.).
- Recognize your outgoing officers (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 organization advisor.
- Share contact information of all organization leaders and advisor.
- Update your student organization roster with Student Activities via the website. This is done each semester.
- Give access and instructions to any online platforms, such as:
  - Organization Emails
  - Membership Rosters
  - Social Media Accounts like Facebook, Twitter, and Instagram
  - Website/Blog
  - Organization HPUTX Email
  - Online document storage (such as Dropbox or Google Drive)
  - National affiliation website login information/passwords
  - Any other communication tool your organization may utilize
- Explain how to reserve meeting/event space on campus for the year online and show them the HPU Private Calendar for events. [www.hputx.edu/calendar](http://www.hputx.edu/calendar). Login with your HPU credentials.
- If you are affiliated with a national organization, explain this relationship and any important information associated.
- Finish all duties that you can and pass on any unfinished items to new officer(s).

## Share Any and ALL Documents

Sharing documents electronically allows new officers to easily update and make changes. Hard copy binders are an option as well, but harder to pass along to future leaders or edit documents. Google Drive and Dropbox are two popular online tools to help store documents online easily. Your hputx.edu email also has online cloud storage. Below are ideas of what to include:

- Mission, philosophy, goals and/or purpose of the organization
- Organization history (More information may be found in Student Activities files)
- Constitution/By-Laws
- Budgets/Financial reports
- Meeting agendas and minutes
- Calendar of events and deadlines
- Officer position descriptions
- Committee position descriptions (Can be found in your organization constitution)
- Organizational chart for officers and responsibilities
- 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 organization has dues, include the list of who has paid/not paid
- A “how to” on how to update your roster on the HPU website
- Past Correspondence (and E-mails to the chapter/organization if applicable)
  - E-mails from the advisor with important information
- Event planning guide/checklist for any past events or programs
  - Sample posters/flyers from past projects, event approval process instructions, Event Planning Guide (found on the HPU website), Campus events contact list
  - Copies of all Chapter/Organization event materials (e.g., invitations, posters, awards, etc.)
- Contacts
  - Professional contacts in the area, Chapter/Organization specific contacts
- Marketing
  - Logos (organization logos, past events, etc.), past print publications, press releases, photos, marketing/branding policy set by your organization
- A Copy of this Guide**

## Finances

- Discuss the financial status of the organization
- Share from where your organization receives money
- If your organization received student organization funding, share information and budget
- Walk through the Student Organization Business and Finance Manual**
- Get new leadership on as signers on your off campus account and old leadership off
- Discuss any fundraising plans or goals
- Documents to share: Budget spreadsheet, past student organization funding applications, any approved budgets

## **Introduce & Explain the Office of Student Life**

Explain that the Director of Student Activities provides support and resources to all Student Organizations. Feel free to stop by our office in MUC 2<sup>nd</sup> Floor to introduce your new officer(s)!

- Become a Registered Student Organization
  - All student organizations must register annually to maintain their status as a recognized student organization. Must attend Risk Management, IOC, have an advisor, and submit a current roster. See the Student Handbook for all details.
- Trainings
  - Monthly SGA/ President's Meeting are required for all groups.
- Website
  - Student Activities has a website page for you, please send updated information each year including contact information and new photos.
- Fall & Spring Recruitment opportunities
  - Student Activities hosts Street Party in the Fall and Spring to recruit new members. You can also participate in Homecoming, Spring Sing, and other events.
- Student Activities Updates
  - A bi-weekly email is sent to inform all students of important events, be sure to forward leadership training opportunities on to your organization to attend.
- Information
  - Keep your contact information up to date with this office to make sure you receive important updates and announcements.

## **Pass along your wisdom!** (This section is for **Existing** officers transitioning out)

You may not see it as wisdom, but being in a position for a year (or less, or more!) 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 for running an effective meeting
- Ideas for improvement
- Prepare and share end-of-the-year activity 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!**