

APPENDIX D



STUDENT ORGANIZATION OFFICER TRANSITION GUIDE

TIPS FOR A SUCCESSFUL TRANSITION

- 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. 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 introduce incoming officers to Faculty Advisors and relevant staff (Dean of Student Affairs, Business Officers, etc.).
- Recognize your outgoing officers (certificates, gifts, thank-you cards, etc.).
- Be available for consultation or questions even after you are gone.

THE BASICS

- Organize all binders, handbooks, files, and electronic documents (including the Student Org Directory and Constitution and by-laws).
- Update the electronic Student Organization Directory to reflect the new officers.
- Give access and instructions to any online platforms, such as:
 - Organization Emails
 - Membership Rosters
 - Social Media Accounts like Facebook
 - Website/Blog
 - Online document storage (such as Dropbox or Google Drive)
 - National affiliation website login information/passwords
 - Any other communication tool your organization may utilize
 - Tiger Zone
- Clean out/organize your organization's mailboxes, locker, or office space. Return office keys to the Assistant Dean of Student Affairs' assistant. Show new officers where these are located.
- Pass along the Student Organization Handbook and instructions for the EMS calendar.
- Finish all necessary correspondence and transfer any ongoing projects to incoming officers.

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
- Discuss any fundraising plans or goals
- Documents to share: Budget spreadsheet, past student organization funding applications, any approved budgets

SHARE ANY AND ALL DOCUMENTS

Share all documents electronically and any hardcopies you might have.

Below are ideas of what to include:

- Mission, philosophy, goals and/or purpose of the organization
- Constitution/By-Laws
- Budgets/Financial reports
- Meeting agendas and minutes
- Calendar of events and deadlines
- Officer position descriptions
- Election process and timeline
- Membership recruitment information and timeline
- List of members and their contact information (e-mail, phone number).
- Past Correspondence (and E-mails to the chapter/organization if applicable)
- Event planning guide/checklist for any past events or programs
- 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

PASS ALONG YOUR WISDOM!

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?

- 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