This handout will provide you some tools to help make your leadership transition run as smoothly as possible. In this handout, you will find:

- Overall Transition Checklist & Timeline
- Materials Transition Checklist
- Sample Transition Meeting Outline

**Transition Timeline & Checklist**

- Conduct elections or selection processes.
- Outgoing Leaders: Gather all your documents and materials in preparation for your transition meeting(s). See Materials Transition Checklist below.
  - Centralize all these documents/materials in either a physical binder or an electronic folder (google folder, external harddrive, other electronic organization tool).
- Facilitate Transition Meeting(s) between outgoing & incoming board members. See Sample Transition Meeting Outline below. You may opt to facilitate multiple meetings to spread content and/or have specific board members meet on their own time.
- Designate an incoming leader to complete the annual re-registration process with the Office of Campus Organizations & Volunteer Programs.
  - Re-registration opens at the end of July and closes in December every year!
  - After your organization becomes recognized, you may sign up to booth at the Anteater Involvement Fair during Welcome Week.

**Materials Transition Checklist**

These materials, whether in a physical binder or in an electronic/virtual folder (google docs or external harddrive), are key operational components to help the incoming leaders be successful.

Outgoing board members can compile the following materials:

- Campus Organization Constitution and/or Bylaws
- Job descriptions for each executive board member
- Passwords for accounts
  - Email, social media, financial, website, etc.
- Financial records including financial account numbers and procedures
  - Copies of proposals for funding
  - Copies of receipts of purchases and contracts
- Meeting Minutes/Records/Notes
Copies of certificate of insurance/insurance applications
Updated rosters and contact information
   - Good to keep a database of alumni for future use
Important contact information
   - Vendors used throughout the year
   - Alumni, community members, on-campus/off-campus partners, supporters, donors
Annual calendar of events
Events/Programs Specific:
   - Timelines and calendar
   - Contracts
   - Waivers used
   - Correspondences (sample emails language)
   - Flyers/Promotional material
   - Event assessments
Publications (Flyers, social media posts, photo galleries, etc.)
Goals for the year (and future goals)
Recommendations and words of advice

Sample Transition Meeting Outline

It is important to convene both the outgoing and incoming executive board members to transfer leadership and important information moving forward. The transition meeting provides continuity between the two groups and allows for the new group to further build upon the previous group. Below is a sample outline of a transition meeting

I. Welcome & Introductions

II. Year in Review
   This portion is a good opportunity for everyone to reflect on the past year through the perspectives of executive board members and general members. Sample questions:

   Organization's Goals
   - What did we accomplish this year? What were some strengths and areas of improvements in accomplishing these goals?
   - What are some goals that were in progress, but can be continued into this next year?
   - What goals need to be changed?

   Organizational Structure
   - Discuss effectiveness of meetings, job descriptions, communication channels
   - What worked? What are some recommendations moving forward?
   - What were some challenges? What is some advice to give to the incoming group?
   - What was the perception of the executive board for the members?
Programs, Activities, Events

- Discuss effectiveness of activities, programs, events:
  - Amount offered throughout the year
  - Quality and intention
  - Perception from members/attendees
  - Logistics - How did the planning process for these activities go?

Membership

- Discuss number of membership from last year, and potential target members for next year. Did we meet this year’s goals? What are some goals moving forward?
- Discuss interaction with membership
  - Activities, such as socials
  - Interpersonal relationships
  - Leadership roles or opportunities for members
  - Member recognition

III. Discussion of Timelines

- Registration through the Office of Campus Organization & Volunteer Programs (COVP)
- Anteater Involvement Fair
- Important annual events (dates and planning timelines)
- Tentative meeting dates for general meetings and board meetings

IV. Officer Transition

Spend some time for each outgoing and incoming officers to meet individually to discuss the specific role:

- Job description, including responsibilities, expectations and specific projects
- Timeline for specific tasks/projects
- Unfinished projects or tasks that need to continue into the new year
- Procedures this role plays in organizational functions. It may include procedures with working with external partners (ie. ASUCI, Student Center & Event Services, off-campus organization, Risk Services, etc.)
- Important contacts and resources
- Suggestions and recommendations for this specific role
- Provide channel for future support (ie. how can the incoming person contact the outgoing person?).

V. Wrap Up

- Official announcement of transfer of leadership
- Positive affirmations for new group moving forward

Adapted from: The Wichita State University Student Organizations’ Handbook (1992-1993)