

Checklist for transitioning

A key component to the success of your student organization and your new officers is the transition of important information. Use this information to formulate an officer transition, retreat or orientation. Your new officers will thank you and you will know you fulfilled your officer duties.

I. OFFICER TRANSITION: A CHECKLIST FOR OUTGOING OFFICERS:

This checklist is intended to provide exiting officers the opportunity to leave a legacy, to share with new officers a complete picture of the organization, past events, successes and struggles. Utilize this checklist when planning a transition meeting, retreat or orientation. Some ideas will pertain to your organization/position while other ideas may not be suitable; each will help all organizations successfully transition:

A. Information about the Organization:

- Review your organization's history
- Review University's Policies and Procedures
- Review the organization's constitution, mission statement
- Review your goals and objectives for the last year
- Share information regarding membership base

B. Officer's Roles and Printed Materials

- Review and pass on old records, binders, files, notebooks and correspondence
- Review job descriptions
- Review officer's written expectations
- Review your organization's agendas and minutes
- Review your organization's calendars
- Review your organization's status reports for continuing projects
- Review your organization's evaluations for projects, completed; include logistics, planning committee duties, fliers, budget
- Provide SOC/SFC group status and future action steps (registration, orientation, budget school)
- Review your organization's previous financial records, mailing lists, email accounts, websites, listserv
- Discuss your achievements
- Discuss your failures
- Pass on membership list and contacts (addresses, phone numbers, email, etc.)
- Provide financial information such as treasurer's accounts, fundraising information and copies of completed requisitions.
- Share list of organization materials- computers, books, magazines, membership to national affiliations

C. Officer Introductions

- Introduce officer to key contact people-include their telephone number, email (SALP advisor)
- Introduce new officers to one another, set aside time for at least an introductory meet and greet

___ Presiding and function in meetings

II. OFFICER TRANSITION: A CHECKLIST FOR NEW OFFICERS:

This checklist was designed for new officers to use as they begin their respective officer's roles. This can be used with outgoing officers, or answer questions of new officers, or with new officers after they have met with outgoing officers.

A. Programming- New Officers

- ___ Re-register organization at the SALP office, update officer contact info on SALP/group website, paperwork for office keys, account access to funds
- ___ Understand present and future programs
- ___ Develop a master calendar with meetings, programs and events
- ___ Establish structure or meeting agendas
- ___ Discuss meeting times (place, time and advertisement)
- ___ Officer board meetings
- ___ Organization meetings

B. Goal Setting-New Officers

- ___ Evaluate past year's concerns and achievements
- ___ Evaluate past officer's goals
- ___ Establish new officer's, individual's and board's goals
- ___ Prioritize officer's goals to member's
- ___ Plan to present goals to members
- ___ Plan group goal setting at your next meeting
- ___ Help to prioritize organization goals with entire membership

C. Officer Training: Some Helpful Hints for Officers

- ___ Decide when new officers begin meeting, officially begin leadership position
- ___ Utilize SALP resources:
 - ___ Orientation of Officers
 - ___ Paperwork
 - ___ University policies
 - ___ Event planning
 - ___ Leadership Workshops
 - ___ Officer Transition Workshops
 - ___ Meeting Management
 - ___ Publicity and Fundraising Ideas
 - ___ Budget Management
 - ___ Mediation

III. Documentation: A detailed plan for transitioning leadership positions:

Ideally, you will create a notebook/portfolio of your leadership position to pass along to your successor. Utilize this outline to formulate your documentation. (This is a great activity for an officer meeting prior to elections) This is a compilation of the checklist provided above.

Officer Notebook

If your outgoing officers don't already have a notebook, provide an inexpensive one with pocket dividers and an outline of what they should include in the notebook they are preparing to pass on, such as the following items. You can add a calendar for the coming quarter, officer and member roster, budget, and Constitution and by-laws.

1. Job Description

- a. Specific responsibilities of the position
- b. Any changes that are needed in the job description based on your experience in the position

2. Job Time-Line

- a. Current year calendar indicating events, timeline for planning events, deadlines

3. Event/Project Documentation

- a. Records of how each project, event or activity were implemented, including files on disk and hard copies. For example:

Public Relations Chair: Event- Party in the Park

PLANNING:

1. Contact SALP office in August to determine date of the event, when registration occurs;
2. Plan with other officers what expectations are for the day, who will attend
3. Determine budget for the event
4. Materials needed- arrange for banner to be created at least 4 weeks in advance, create fliers for table, purchase pens to give-away to all participants
5. Confirm officer attendance one week prior to event and duties assigned (who is setting up, who is taking down, who is tabling each hour); email complete list to all officers; confirm check-in time with SALP organizer
6. Organize display materials, create design if you personally are not setting up,
7. Arrange for all materials for the day of the event to be picked up and ready to go the night before the event

DAY OF EVENT:

1. Check in to SALP table in Park Blocks at time provided
2. Set-up organization's table in assigned space
3. Have fun!

EVALUATION:

1. At first officer meeting post-event evaluate the process, its outcome, fulfillment of expectations, tips for the future (SWOT analysis)
2. Document process, what to do differently, what worked; prepare report for the next year's event
3. Finalize expenses, communicate to treasurer and document for next year's officer

Student Activities and Leadership Programs

4. Evaluation of Event/Project
 - a. Written evaluation from participants if collected
 - b. Outgoing officer's feedback and recommendations
5. Budget
 - a. Accounting of how allocated funds were spent
 - b. Paperwork related to budget, internally for group and with SALP
6. Resources
 - a. Key people helpful in fulfilling responsibilities and contact info
 - b. Record of donations, materials bought or needed for position/events
7. Other Essentials
 - a. Keys, email accounts & passwords, financial accounts

Warm-Up Activity

Suggested time: 5 minutes

This warm-up is designed to get student leaders' creative, insightful and reflective juices flowing. It is a brief exercise that should provide participants with an understanding of the ultimate goal of the workshop, the keys to a productive and smooth leadership transition and well-informed incoming leaders. Distribute the warm-up sheets and make sure all participants have something to write with. You could distribute these sheets as participants arrive, or all at once. Ask the participants to take a moment to reflect on their transition into their current leadership position at either the start of the last term/year/etc.

Facilitator: Explain that the warm-up consists of a series of statements to which they will respond yes or no. This should only take a few minutes.

The statements are:

- I met with my predecessor and was able to ask questions of them prior to taking over their leadership position. Yes No
- I was provided with all the documents (constitution, budget, past calendar, email account passwords) needed prior to taking over my current leadership position. Yes No
- I was introduced to key members of the faculty, administration and community prior to my transition into my current leadership position. Yes No
- I was introduced to my SALP advisor prior to my transition into my current leadership position. Yes No
- My student organization hosted a transition retreat/workshop/new leader orientation prior to my current leadership position began. Yes No
- I was adequately informed of the key duties in my position prior to my transition into my current leadership position. Yes No
- I feel I was well prepared for my transition into my current leadership position. Yes No

Facilitator: After students have had a few minutes to respond to the questions ask the following of them:

Please stand if you were able to answer yes to 4 or more of these statements? (Encourage the crowd to give a round of applause in support of their transition.)

Please stand if you answered no to all the questions.
(Encourage the crowd to give a round of applause in support of their leadership despite the lack of transition.)

Finally, please stand if you were able to answer yes to all 7 statements.
(HUGE applause for the groups that successfully planned a transition for their leaders; allow them to state which group they are from.)

Experiences Activity- Top Threes

Suggested time: 10 minutes

7 minutes to introduce and complete worksheet

3 minutes to share experiences with neighbor

This training is designed to get the ball rolling in leadership transitions. This reflection process is not the limit of all thought-process involved. It is designed to be a time for students to see how their own leadership experience has been positively/negatively affected by the type of transition they received/did not received.

Challenge students to be as specific as possible.

Facilitator: Using the worksheet provided, reflect back on your experience in your current leadership position to identify areas you succeeded or could have done better. Use this activity to showcase to your fellow leaders the need to transition more effectively in order to leave a positive legacy. The successes you found should be built upon by your successors versus them needing to re-create the wheel.

Identify your top three:

Top 3 most important documents to your leadership position

- 1.
- 2.
- 3.

The 3 best events your organization hosted/co-sponsored/attended:

- 1.
- 2.
- 3.

The 3 most important contacts/allies to your leadership position:

- 1.
- 2.
- 3.

If I were to do this year over again, I would do these 3 things differently:

- 1.
- 2.
- 3.

Facilitator: Now, turn to your neighbor and share 2-3 thoughts with him/her. After allowing the group to share with their neighbor, see if anyone want to share a thought with the larger group.

SWOT Analysis

What is it?

SWOT Analysis, or sometimes known as the **TOWS Matrix**, is a [strategic planning](#) tool used to evaluate the **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats involved in a [project](#) or in a [business](#) venture or in any other situation of an organization or individual requiring a decision in pursuit of an objective. It involves monitoring the marketing environment internal and external to the organization or individual. The technique is credited to [Albert Humphrey](#), who led a research project at [Stanford University](#) in the 1960s and 1970s using data from the [Fortune 500](#) companies.

(Retrieved April 12, 2007 from http://en.wikipedia.org/wiki/SWOT_analysis)

Why use it?

To develop a plan that takes into consideration many different internal and external factors, and maximizes the potential of the strengths and opportunities while minimizing the impact of the weaknesses and threats.

When to use it?

While developing a strategic plan or planning a solution to a problem, after you have analyzed the external environment (for example, the culture, economy, health, sources of funding, demographics, etc.).

How to use it:

Internal Analysis: Examine the capabilities of your organization. This can be done by analyzing your organization's strengths and weaknesses. **External Analysis:** Look at the main points in the environmental analysis, and identify those points that pose opportunities for your organization, and those that pose threats or obstacles to performance. You can use this information to help you develop a strategy that uses the strengths and opportunities to reduce the weaknesses and threats, and to achieve the objectives of your organization.

(Retrieved April 12, 2007 from <http://erc.msh.org/quality/ittools/itswot.cfm>)

Student Activities and Leadership Programs

(Student Organization Name)

(Event)

(Date)

SALP

Midnight Breakfast

March 14, 2007

<u>STRENGTHS</u>	<u>WEAKNESSES</u>	<u>OPPORTUNITIES (FOR GROWTH)</u>	<u>THREATS (OPPORTUNITY FOR GROWTH)</u>
Band, food,	Limited advertising	Publicity, raffle prizes, community partnerships, student group involvement	Reliance on word of mouth for advertising, less funding,