TRANSITION CHECKLIST

A smooth transition is the responsibility of both the outgoing and incoming members of an organization. Successfully transitioning your organization acts as a means to provide training for new officers, closure for outgoing leaders and helps the organization maintain consistency from year to year.

☐ Renew your student organization BEFORE the second Friday in September

Registration of student organizations is an ANNUAL three-part process. Groups must re-register each year to remain active. The first step is to complete the officer and advisor update on-line at www.sc.edu/sos beginning in August. Secondly, you must attend a Renewal Workshop in the fall. Dates and times for these workshops are listed on the website. The third step is ensuring that your faculty or staff advisor confirms their role as the advisor.

☐ Share files and create a binder/flash drive related to your position and organization

Written information and computer copies of files are very helpful if the outgoing officer graduates or moves on to a different role on campus. Keep the binder/flash drive in a central location that officers can access. Your advisor should have copies of all important files and an operations manual with important information about your club.

Make sure the incoming officer has a copy of the following items, which should be part of an Operations Manual for your student organization:

- Copy of constitution and by-laws
- Mission, philosophy, goals and purpose of group
- Organization history
- Meeting minutes and agendas
- Contact information of important people/offices on campus
- Financial records and access to accounts
- List of basic annual procedures and/or calendar of annual events
  - Election process and timeline
  - Event planning guides
  - Sample flyers or promotional materials
- Past correspondence
- Web page and webmaster information. How do you maintain the site?
- Email, Blackboard group logins and passwords. Who has access? How do you transition accounts?

☐ Set up a meeting and/or plan a retreat

Make sure the outgoing and incoming officers meet together and discuss all of these issues and answer questions. Retreats are a fun way to train new officers. Topics to consider on a retreat include: goal setting, idea brainstorming, and group development. Visit the Leadership and Service Center for help in creating a retreat and to get materials for teambuilders or icebreakers.
Review budgets and funding
What is the financial status of the organization?
Where did the organization get money from this year?
Did the organization apply for funding and/or receive funding through the Student Government/Student Activity Fee?
Which fundraisers worked? Which didn’t?
If the club has a bank account, who has access? Can you transition prior to the old officers leaving? Is the advisor one of the persons with access to the account? Does the advisor receive bank statements?

Review past and future organization events
Which events were successful this year? Which should be continued?
When should the planning start?
Which events didn’t go well? Should they be revamped and tried again or just dropped?
Were there any pitfalls or things that could have been improved?

Reserve meeting rooms and dates
Where were meetings held? What worked? What didn’t?
Has a summer contact list been created for the organization?
Have you reserved your meeting rooms? Rooms book quickly and groups that are registered early and have planned ahead have the best opportunities. Contact Event Services in the RHUU.
www.sa.sc.edu/rhuu/

Recruitment activities
What recruitment activities were done? What worked? What didn’t work?
Why did new members stick around? If they didn’t, what made them leave?
A great way to recruit new members is through the Student Organization Fairs held in the fall and spring.

Review a calendar of the year
Take out a calendar of the current school year and review it together. What were the busy times?
What kinds of things should the new officer anticipate? You may not remember everything you did, but looking at your calendar may jog your memory.

Make introductions to resources
Schedule time to walk around campus together so the outgoing officer can make introductions to the important people who can serve as resources to the incoming officers. Make sure new officers meet with the organization advisor as well.

Next Steps – create a “To Do” list
Work together to make a list of “things to do” for the incoming officer. Which items need their attention now? Make this list together so the outgoing officer can help with direction. Be sure to trade contact information so that the outgoing officer can be a resource in the year ahead.

Bookmark and frequently check the Student Organization Website
The Student Organization website has important information and resources to help your organization throughout the year. The site includes information about sign-ups for organization fairs, downloadable forms, policies and more! www.sa.sc.edu/studentorgs/