TRANSITION YEAR-TO-YEAR

When a new school year begins, don't lose all the knowledge of the previous year. Create a transition binder to make sure things like passwords and project ideas don't get lost. This binder can be a physical or virtual document, or both!

HOW TO TRANSITION

1. Decide or confirm at the beginning of the year when you'll elect or determine new officers.
2. Create a transition binder (see suggested contents outlined below).
3. Schedule a meeting to pass on the transition binder and answer questions for the new officers.

Here's what you might include in your transition binder:

MUST HAVES

- **Table of Contents**
- **History**: Provide a brief history of your Student United Way including details like when it started, why, by whom, awards it has won, articles published about it, etc.
- **Constitution and By-Laws**
- **Registration Forms**: Include any registration forms you submit to your school and UnitedWay Worldwide.
- **Officer Positions**: Include an organizational chart showing how officer positions are organized. Include detailed officer position descriptions, a sample officer application form, and the process and timeline for selecting new officers.
- **Digital Presence**: Include links, usernames and passwords for everything. This might include social media accounts, emails, websites, Google drives, your school's student organization webpage, etc.
- **Contact Information**: Include phone numbers and/or emails of executive officers (old and new, in case future officers have questions), your campus adviser, your United Way adviser and any other important contacts.
- **Current Members**: List all current members and their contact information.
- **Vendors**: If you regularly use certain vendors for things like food, permits or supplies, list their names, contact information and how much they typically charge.
- **Contracts & Forms**: Include any contracts and forms you've used or might use again.
- **Pending Projects**: Include the current status and next steps of any pending projects that will continue into the next school year.
HOW TOS

- **Run a Meeting:** Include best practices for running a meeting, details on how to reserve a room, and previous meeting agendas and minutes. Check out the “Lead a Meeting” resource, too.
- **Budget:** List best practices on how to write and maintain a budget. Include last year’s budget and any bank account information.
- **Create Events:** List best practices and lessons learned for what works in selecting and running events. Include a copy of last year’s calendar of events and several descriptions and planning documents of previous events and projects you’ve done. Check out the “Create Projects” resource, too.
- **Track Progress:** Provide a blank progress report to be completed throughout the year with recommendations for what to track (number of volunteers, any impact you made such as number of cans collected or houses weatherized, quotes and stories from club members, etc.)
- **Recruit and Retain Members:** Provide your recruitment and retention strategies along with a timeline for when to take which actions around recruitment and retention. List best practices and lessons learned in recruiting volunteers. Check out the “Recruit Members” and “Retain Members” resources, too.
- **Promote your Club:** List best practices and lessons learned in promoting your club, sending communications, getting social media followers, etc. Provide a link to photos that can continue to be used in promotion and provide plenty of samples of previous promotions you’ve done such as emails, text messages, social media posts and flyers. Check out the “Rock Social Media” resource, too.

WORDS OF WISDOM

- **Letters:** Include a letter from the former to new president, and even letters from former to new officers.
- **Tips:** Crowdsourced words of wisdom from existing officers to pass along to the new club members.
- **Talk About Failures:** Be sure to share your failures as much as your successes--they’re just as important!