

## Student Organization Transition Guide

After next year's executive is elected, transition begins. During this period, outgoing executives orient incoming executives to their roles. Ideally, you should set aside 1-2 months for transition.

**Outgoing executives are responsible for end-of-year mandatory requirements, including the Annual Report.**

Club constitutions should mandate a minimum one-month overlap between executives. This is not a whole lot of overlap between incoming and outgoing executives, and this guide recognizes that fact. The incoming executive might be mostly or entirely new to administering the club.

### Where to Begin

The transition process should begin with all executives meeting with their successors to discuss club responsibilities. Outgoing executives should outline the specific duties of the position and what they feel incoming executives need to know, and incoming executives should discuss what they feel they need to know or want to know.

Use this document along with your club constitution as a starting point for these discussions.

### Checklists

#### **Transition Documents**

A general 'transition folder' (paper or electronic) should be created as a resource for incoming executives. It should include, or at least direct incoming executives to, the following:

- Login information for all club accounts
  - ClubHub Portal (see <http://suclubs.orgsync.com/portalaccess>)
  - Email(s)
  - Social Media/Website
  - PayPal, Dropbox, Google Drive, or other accounts
- The SU Clubs Manual, available online: <http://suclubs.orgsync.com/clubsmanual>
- Club's constitution, policies, and procedures
  - This should include executive position descriptions, including identifying any "grey" areas of overlapping responsibility
- Club event and/or ongoing issues information
  - Descriptions of events held, or initiatives organized
  - Event plans, checklists, and debriefs
  - Any task-specific checklists or guides
  - A rough timeline of the upcoming year, including any relevant deadlines
  - Document templates (e.g. agendas, invoices)

- ❑ Sponsorship information
  - ❑ A list of important contacts (e.g. university contacts, vendors)
- ❑ Financial information
  - ❑ Banking information – contact the CSO if you need a letter endorsing a change of signing authority
  - ❑ Budgets from previous years
  - ❑ Invoices, receipts, etc.
- ❑ Communications information
  - ❑ Your club's logo, slogan, graphic design, and other 'branding' information
  - ❑ Posters, membership cards, or images
  - ❑ Any unique communicate/marketing methods used by the club
  - ❑ Outgoing club executive contact information
  - ❑ Old membership information
- ❑ Words of wisdom: have each executive include a brief reflection on their year.
  - ❑ What is one thing they wish they had known at the start?
  - ❑ What was their greatest success? Their biggest challenge?

### **General Important Tasks**

- ❑ All incoming executives must be given access to the club's ClubHub portal.
- ❑ All incoming executives must be made aware of SU mandatory requirements and due dates (including survival seminars, clubs insurance, event planning, space booking, clubs week, annual reports, etc.)
  - ❑ See <http://suclubs.orgsync.com/requirements> for details.
- ❑ All incoming executives should be made aware of SU resources available (including free space and table bookings, event funding, food and drink funding, services, etc.)
  - ❑ See <http://suclubs.orgsync.com/resources> for details.
- ❑ Signing authority for the club's bank account must be transferred to the incoming executives. If you are unsure how to do this, consult your bank and/or the CSO.
- ❑ Outgoing executives should involve incoming executives directly in their duties as soon as they are chosen (e.g. have them take the lead in organizing the year-end event)
  - ❑ Incoming executives should be invited to all internal and external meetings relevant to their position.
  - ❑ To build trust and rapport among the incoming executive, team building activities should be organized (especially if they do not all know each other well).
  - ❑ Introduce incoming executives to important contacts.
- ❑ All incoming executives should be given an overview of the club's Constitution.
- ❑ All incoming executives should be given a general overview of the current state of the organization: membership, finances, the state of important external relationships, etc.
- ❑ All incoming executives must be given access to the club's records management system (e.g. Google Drive, Dropbox, cashbox, lockers, etc.).