Student Club and Organization Transitional Plan Checklist

In order for your organization to leave its legacy and continue to grow clubs and organizations should have an officer transition plan in place. Transitioning from year to year is more than just the new members taking over. It is a process of change and to create a positive experience for new and old members. This document is here to help with the process and give suggestions for how to make sure your club or organization is successful year to year. Please note you can also speak with your Student Life Advisor on any transition needs.

Tips for Success

- Should have at least a 1 month overlap between current officers and future officers. Many organizations may do a whole quarter or more.
- Get your old and new group together! Include your advisor and have a meeting to share what went well and what could be improved upon. A great way to do this is by going on a retreat, but you can do something as basic as a meeting or dinner to talk about the transition.
- Introduce officers to the important people that your group works with as well as their Student Life Advisor.
- Celebrate your year together. Recognize your organization for their work. This will create good feelings towards your organization and will be a positive message to other students who may be looking to join your organization.

Checklist

- Introduce new members to your club advisor(s) as well as your Student Life Advisor
- Create a contact list of all new members and advisor(s)
- Remind new officers to renew the organization in the Fall
- Give access and instructions for any email accounts, websites, resource etc. Examples include:
  - Club Email
  - Listserve
  - Social Media Accounts
  - Website/Blog
  - Document storage (online or binder of information)
  - National Affiliation information
- Give list of equipment that the organization has in Student Life
- Share the Student Club and Organization Handbook with new members and make sure advisor has access to the Advisor Handbook
- Show new officers how to reserve space (you can have them shadow the process)
- Show new officers how to request money (you can have them shadow the process)
- If you are affiliated with a national organization, explain this relationship and any important information associated.
- Finish as many items as possible and then pass any unfinished business to the new officers.
Create a Resource folder or binder

We highly suggest keeping documents electronic and on a shared drive online (google drive, dropbox etc.). Although you could create a binder, these fall apart over time from use and items could get lost. Ideas of what to include:

- Mission, philosophy, goals and/or purpose of the organization
- Organization history and Constitution/By-Laws
- Budgets/Financial reports
- Meeting Agendas and minutes
- Any evaluations of events/programs
- Calendar of events and deadlines
- Committee position descriptions
- Organizational chart for organization
- Election process and timeline
- Membership recruitment information and timeline
- List of members and their contact information (e-mail, phone number).
  - List of people expressing an interest but not joining/paying and their contact information
  - If your club has dues, include the list of who has paid/not paid
- Membership application, if applicable
- Past Correspondence
  - E-mails to the chapter/organization
  - E-mails from the advisor with important information
- Special Events
  - Event planning guide/checklist for any past events or programs
  - Sample posters/flyers from past projects, old press releases, Event Approval process instructions, Event
  - Planning Guide, Campus events contact list
  - Copies of all Chapter/Organization event materials (e.g., invitations, posters, awards, informativequarter sheets, etc.)
- Contacts
  - Student Life and Leadership Programs
  - Professional contacts in the area
  - Chapter/Organization specific contacts
- Marketing
  - Logos (club logos, past events, etc.)
  - Any past print publications, press releases
Marketing/branding policy set by your club, Photos

Information adapted from:
Montana State University Office of Activities and Engagement
San Diego State University Office of Student Life & Leadership
University of Wisconsin-River Falls Office of Student Life