

Student Organization Officer Transition Checklist

Overview:

Ensuring a successful transition is the responsibility of both the outgoing and incoming leadership. The passage of knowledge, experience, accomplishments, and goals for student organizations will help current officers gain a sense of completion and bring closure to their terms. At the same time, the transition gives the new officers valuable information, advice, and confidence for the future.

Checklist:

- Update your constitution, bylaws, job descriptions, any other relevant documents to reflect changes made during your administration
- Write up reports about traditions, continuing projects, ideas, and advice
- Transfer all organization documents to the incoming officers. Your “transition binder” should include:
 - Rosters and frequently used numbers/emails
 - Contact information for alumni, partners, advisors, and community organizers
 - History of organization and organizational chart
 - Constitution and bylaws
 - Job descriptions and expectations of each position
 - List of goals - accomplished and unaccomplished
 - Past meeting agendas/minutes/reports
 - Copy of budgets & financial documents
 - Workshops and calendars of previous events
 - Pluses and deltas, reflections, advice
 - Previous flyers, materials, logos, templates, photos, etc.
 - Event debriefs/assessments
 - Leadership resources and handouts
 - Upload key historical documents to your organization’s Callink Documents folder
- Have an incoming officer complete the annual re-registration process with the LEAD Center and list incoming officers as Signatories and ASUC/GA Agents during the process. *Step by step instructions on this process can be found at lead.berkeley.edu*
- Set up a transition meeting with both outgoing and incoming officers
- Have incoming and outgoing officers meet with your LEAD Center advisor together

Key Student Organization Dates:

- JULY-SEPTEMBER: Re-Register RSO and RSO Signatories with the LEAD Center
- OCTOBER: Attend Leadership Symposium
- FEBRUARY-MARCH: Submit ASUC Mid-Year Report/Funding/ Sponsorship/Space Application

Transition Resources

Goalsetting:

Practice SMART goals. When setting your goals, evaluate if they are:

- Specific
- Measurable
- Attainable
- Relevant
- Timely

How do your goals meet each of the SMART criteria?

Sample Transition Meeting Agenda:

Welcome and introductions	5:00pm - 5:10pm (10 mins)
General policies and procedures	5:10pm - 5:30pm (20 mins)
Incoming/outgoing officer 1-on-1s	5:30pm - 6:00pm (30 mins)
Go over job description and expectations	
Share past project evaluations and advice	
Discuss ongoing projects	
Break	6:00pm - 6:05pm (5 mins)
Goal setting session	6:05pm - 6:25pm (20 mins)
How do we reach our goals?	6:25pm - 6:40pm (15 mins)
Share resources available to meet goals such as funding opportunities, potential venues, LEAD advisors, etc.	
Farewell and congratulations	6:40pm - 6:45pm (5 mins)

Leadership/Team-building Resources:

Cal Facilitation Team - a student-run organization of facilitators that offer various leadership and team-building workshops for free!

cal.facilitation@gmail.com

lead.berkeley.edu/cal-facilitation/