

# 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, and 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” and CallLink page should include:
  - Updated rosters (with incoming and departing members) and frequently used numbers/emails
  - Contact information for alumni, partners, advisors, and community organizers
  - History of organization and organizational chart
  - Constitution and bylaws
  - ASUC Funding, financial documents, and other sources of income
  - Job descriptions and expectations of each position
  - List of goals - accomplished and unaccomplished
  - Past meeting agendas/minutes/reports
  - Workshops and calendars of previous and future events
  - Pluses and deltas, reflections, and advice
  - Previous flyers, materials, logos, templates, photos, etc.
  - Event debriefs/assessments
  - Leadership resources and handouts
  - Upload key historical documents to your organization’s CallLink Documents folder
- Have an incoming officer complete the annual re-registration process with the LEAD Center and assign 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 between outgoing and incoming officers using CallLink (<https://callink.berkeley.edu/>)
- Have incoming and outgoing officers meet with your LEAD Center advisor together
  - LEAD Center Adviser Walk in Hours for spring 2016 are 2-4 pm Monday-Friday

### Key Student Organization Dates:

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

\*Find detailed information and deadlines on the LEAD Center website

## 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 one-on-one	5:30pm - 6:00pm (30 mins)
<ul style="list-style-type: none"><li>● Go over job description and expectations</li><li>● Review budget for ASUC and other funding</li><li>● Share previous project evaluations and advice</li><li>● Discuss ongoing projects</li></ul>	
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 who offer various leadership and team-building workshops for free!

[cal.facilitation@gmail.com](mailto:cal.facilitation@gmail.com)

[lead.berkeley.edu/cal-facilitation/](http://lead.berkeley.edu/cal-facilitation/)