

Leadership Transition Checklist (Law)

Leaders,

Good officer transitions are essential to the operation and success of student organizations. A successful executive board is the glue that holds the organization together and is the fuel that propels it forward! Without taking the proper time to effectively transition new incoming officers, the organization loses its momentum from the previous year. The time that could be used to continue moving the organization forward is now being spent on catching up. This checklist is designed to aid in a successful transition of outgoing and incoming officers!

**Be sure to review all information with incoming officers*

Responsibilities of Outgoing Officers

1. Constitution

- ☐ Your organizations history
- ☐ Regent University's policies and procedures
- ☐ Mission statement
- ☐ Review the organizations constitution *together* with new incoming officer
- ☐ Update any bylaws at this time if needed

2. Executive Board

- ☐ Job Descriptions
- ☐ Contact Information
- ☐ Fill *all* positions (please check ☐yes or ☐no)
- ☐ Determine what positions are staying open based on constitutions
- ☐ One-on-ones
 - a) Discuss and ensure each officer knows what their job is

3. Event Processes

- ☐ Sign-up sheets/sign up genius
- ☐ Forms and processes for requesting on campus and off campus events

4. Events

- ☐ All Forms to complete and *who* to go through for the event
- ☐ After Action Event Evaluation form
- ☐ Review organizations calendar
 - a. Events
 - b. Leadership trainings
 - c. Other important events
- ☐ Review which events you recommend and do not recommend for next year
- ☐ Approval processes
 - a. Rules about food
 - b. Where you can and cannot hold events

5. Passwords

- ☐ Google Doc or Google Calendar
- ☐ Gmail accounts to pass along
- ☐ Social Media (Facebook, Instagram, etc.)
- ☐ Link Tree
- ☐ Slack
- ☐ Group chats
- ☐ Discord
- ☐ Canva

6. Financial

- ☐ Sponsorships
- ☐ BJ's card
- ☐ Company Card
- ☐ Tax Exempt Form
- ☐ Explain how to complete and submit expense reports
 - a. Cost Codes
 - b. Who must approve the expense report

7. Agenda/Meetings

- ☐ Tasks and delegating other members
- ☐ Meeting notes examples and templates
- ☐ How to set up a meeting
- ☐ Sit with your new officer and let them schedule and run a meeting under your guidance
- ☐ Have incoming officer sit in on Executive Board meeting

8. Communications

- ☐ Email correspondences and what to include
- ☐ Share email templates
- ☐ Share addresses and phone numbers

9. Marketing

- ☐ Approval policies for materials
- ☐ Flyers (digital and print)
- ☐ Canva
- ☐ Mary Bunch email chain
- ☐ Discuss who approves digital marketing and approval process
- ☐ All marketing avenues
- ☐ Review any previous advertisements as examples for past events

Responsibilities of Incoming Officers

1. Constitution

- ☐ Relay constitution to new team

2. Executive Board

- ☐ Distribute and review results of new member survey for mission, culture, suggestions, and improvements for upcoming year

3. Event Processes

- ☐ Ensure understanding of how to submit on-campus and off-campus event request forms

4. Events

- ☐ Master calendar with all meetings, programs, and events
- ☐ Attend Set Up Your Successor Training and Fall Event training

5. Communications

- ☐ Ensure well organized and detailed records are kept in the upcoming year to assist with new transitions
- ☐ Retrieve email templates and communication template examples from outgoing officer
- ☐ Retrieve phone numbers and emails of members

By signing this document, you affirm you have reviewed all components of the leadership transition checklist with the new incoming officer.

(Current President Signature)

(Date)

(Incoming President Signature)

(Date)