



CENTER FOR STUDENT INVOLVEMENT
TRANSITION TASK LIST

The following is a list of specific transition information/resources that new organization officers should acquire from outgoing organization officers prior to taking office. The list is not intended to be exhaustive; please add specific information resources to tailor to your specific organization's needs.

Collect- Officer Specific Materials

- A copy of the constitution, by-laws, chapter policies, and procedures
- Officer Job Description – as outlined in by-laws and revised by outgoing officer supported by the organization's membership
- Goals and objectives from the last year
- Status report for ongoing projects and past projects
- Previous meeting minutes/agendas and officer reports
- Financial records/budget relating to officer position/organization in prior years
- Organize all notebooks, binders, files, and electronic document folders
- Finish all necessary correspondence (letters, e-mails, phone calls, etc.)
- Develop action plans and timelines for new officer transition, including but not limited to:
 - Necessary meetings attended and chaired by the officer
 - Important tasks
 - Introductions to key people (relationship building/networking)
- Sponsorship information (i.e. what organization, event, etc.)
- Electronic copies of posters/flyers/t-shirt designs
- Templates for forms/letters
- Asset list (i.e. tables, chairs, supplies, etc.)
- Login information/password for emails, website, Facebook, Instagram, Twitter, etc.

University Specific Materials

- Risk Management Guidelines
- University Polices & Information

Contact Information For:

- Organization Advisor
- Center for Campus Student Involvement
- Office of the Dean of Students
- Other student organization contacts (clubs, fraternities/sororities, RHA, etc.)
- University Resources (vendors, room reservations, catering, etc.)
- Emergency Contact Information (police, fire, safety)

- Outgoing person's contact information (in case there are questions when the new person takes office)
- UIC staff contacts (faculty/staff/alumni advisor, Student Activities advisor, etc.)
- Vendor contacts (i.e. caterers, transportation services, printers, t-shirt companies, etc.)

Words of Wisdom/Parting Thoughts

- Mistakes you made that could have been avoided
- Advice you wish you had before assuming office last year
- Questions the new officer may have

Other

- Governing Information (by-laws, meeting times, contact information)
- Historical Files
- Planning calendar that denotes critical dates (anniversaries, academic holidays, etc.)
- NOTES:

Officer Transition formats:

Please consider the HOW you transition outgoing officers by reviewing the formats below. There is not a RIGHT or WRONG way to transition but rather what works best for your organization.

“Independent Study”: Incoming officers review officer expectations and responsibilities individually and then discuss them with outgoing officers.

“Learning Contracts”: Developed individually between incoming and outgoing officers, learning contracts pre-establish a list of skills and tasks that incoming officers must satisfy in order to be eligible to run for/hold a specific office in the organization. Learning contracts are best established by an organization's leadership team that examines the officer role from a variety of perspectives. Once the list is complete, incoming officers meet with outgoing officers to identify their skill level for each condition. Next, the outgoing officer provides the necessary training so that the incoming officer is able to gain the necessary skills, knowledge and tasks to be successful.

“Shadowing/Mentoring”: Incoming officers are paired with outgoing officers for a specific period of time to learn position basics and to observe the outgoing officers. Through discussion and interaction, outgoing officers share expertise, insight and advice for the incoming officers. Through a “shadowing” process, new officers are elected and serve for an “elect” (i.e.: president elect) term with the current officer to learn processes, meet people and transition materials.

“Retreats/Workshops”: Although they can take different formats, retreats and workshops provide an opportunity for incoming and outgoing officers to transition materials and discuss pertinent issues. All retreats and workshops should be planned in advance and should seek to address specific goals and objectives. A sample retreat outline is included in the Officer Transition packet.

Transition Questions: During Transition Meetings

- What do you consider to be the responsibility of your office?
- What do you wish you had done, but did not?
- What did you wish you knew before taking office, but did not?
- What did you try that did not work? Why?
- What problems or areas will require attention within the next year?
- Who/what resources were the most helpful in getting things done?
- What key relationships need to be built?
- What should be done immediately?
- How did you work with other officers?
- What specific paperwork is required of the officer?