

**The University of Southern Mississippi**  
**Student Organization Leadership Transition Checklist**

Every year unsuccessful leadership transitions hamper future successes of student groups at The University of Southern Mississippi. This year please remember that a successful transition is not only the glue that will hold your organizations together from year-to-year but also the fuel that continues to propel them in a forward direction. The good news is that a successful transition is neither difficult nor very time-consuming. Please remember that *all* the following tips may not pertain to your group, but most are relevant and important for the majority of student groups.

For a successful transition, below is a list of responsibilities for **Outgoing Officers**:

■ **Be sure to review all of the following information with incoming officers:**

- Your organization's history
- Your organization's constitution, mission statement, and officer responsibilities (if the old items need updating, now is a great time to do that!)
- Review and pass on old records - including meeting agendas and minutes, binders, files, notebooks, copies of documents used for advertising past events, and correspondence (Pass along everything you got!)
- Officer job descriptions and written expectations for each new officer regarding their role and responsibilities (offer advice on past successes and mistakes)
- Your organization's calendar (and any important annual events that non-exec board members might not know about, i.e. fall activities fair, fall leadership training events, business managers meeting, and budget deadlines)
- Your organization's status reports on continuing projects. Please be sure to finish any unfinished business (especially monetary), and if the business cannot be finished, please be sure to inform new officers—with specific detail—what has been left unfinished
- Your organization's annual budget, completed program evaluations for last year's projects and events, achievements, and mistakes
- Review important contacts used for event planning

■ **Be sure to DO the following:**

- Update letterhead, Organization Information Form (OIF) with LSI, and website
- Pass on membership lists, mailing lists, computer passwords, phone passwords, accounts, contracts, addresses, phone numbers, emails etc...
- Recruit new officers as early as possible. The earlier transition begins the less likely it will be forgotten at the end of the year. If time allows, offer time for your new officers to shadow you and work with you to lead the last projects and group meetings
- Meet with your incoming officers and help them plan their first courses of action over their first few months
- Make sure new officers have been trained.
- Introduce officer to key contact people, especially your group's advisor(s)
- Don't be afraid to make a group event out of the "changing of the guard" (this can be as simple as a recognition to outgoing and incoming group members at your last meeting, or as formal as a dinner celebration/party to energize the group on your upcoming year, events, and leadership)

Transition responsibilities for **Incoming Officers**:

■ **Be sure to do ALL of the following:**

- Understand present and future programs
- Develop a master calendar with meetings, programs, and events
- Establish meeting agendas, meeting times, and locations (you can reserve meeting locations up to a year ahead of time)

- Remember to keep well organized and detailed records in the upcoming year so it will be easy to transition when you recruit and train new leadership
- Begin recruiting and training promising group leaders as early as possible; offer time for your new officers to shadow you and work with you to lead the last projects and group meetings
- Evaluate with outgoing officers last year's concerns, achievements, and past goals
- Establish new goals and prioritize
- Plan group goal setting at next meeting
- Try to arrange for new officers to keep in contact over the summer break
- Utilize your advisor and Office of Leadership and Student Involvement resources
- Consider making fall leadership training mandatory for new leaders and officers-go together as a board
- Check email often over summer for important dates, deadlines, and correspondence from your advisor

**Below is a list of questions and exercises that are important to think about while training new leadership. It may be helpful to actually write answers to these questions to give to your incoming officers.**

### **Items for Your Group's Leadership Notebook/Binder**

- 1) What was your best experience in this position?
  
- 2) What tips could you give your successor to make things smoother for next year?
  
- 3) Name the administrators/staff you found to be helpful in your position.
  
- 4) What did you find most difficult in this position?
  
- 5) What was the best resource you used in this position?
  
- 6) Which offices/departments/student groups did you co-sponsor with that worked well?
  
- 7) Please list any projects or ideas you were developing that you would like to see continue.
  
- 8) Name one thing you wished you knew when you started the position.
  
- 9) Do you think the student body knows of your position and the services your group provides?