Transition Guide
Tips for Successful Transitions:

- Have a transition planning meeting
- Introduce new officers to key contacts
  - Advisors, community partners, UNC administrators
- Technology orientation
  - Update new positions/names in Heel Life
  - Provide information regarding your org’s usage of their webpage
- Create a Transition Notebook (see Outgoing Officer and Key Contact portions)
- Fulfill outstanding obligations (especially financial)

Transitioning Methods:

- Documentation/record-keeping of important info
- Reflection
  - Past events, future goals, critical questions
- Shadowing
- Meetings/parties/retreats
  - Relaying information face-to-face
  - It’s important to acknowledge and celebrate the past of the organization and energize for the future

Successful Transitions:

- Preserve important information and relationships
- Build and learn from past successes and mistakes
- Allow for continuity and stability of the organization
- Keep members excited about the organization
- Follow a plan!

Outgoing Officer

- Gather and organize all documents and files
- Finish all necessary correspondence (letters, emails, phone calls)
- Prepare year-end report and evaluation (Annual Report from SLL)
- Review the organization’s constitution, bylaws, written material, and other documents needing revision
- Develop training action plan and timeline for new officer transition, including but not limited to:
  - Necessary meetings attended or conducted
  - Important tasks
  - Sharing tasks and duties with other officers and/or members
  - Introduction to key individuals
  - Required meetings and trainings workshops
  - Finance information
- Update Heel Life with information of new officers and their positions
- Annual Registration Process
  - Fall Registration Period (August 15th – September 30th)
  - Spring Registration Period (December 1st – January 31st)
  - What does my organization need to do to remain registered? Complete these three steps:
    1) Send two officers to an Officer Orientation Session during the appropriate registration period
    2) Complete the online registration form located in Heel Life
    3) Instruct your advisor to complete the online Advisor Agreement Form

Key Contacts Transition Tip: List key campus and community contacts. In the notes section, include info about the past relationship with this person, if they are a key ally, and what they can help you with specifically

Contacts in The Community Transition Tip: Notify the community partner of the change in leadership. Have the outgoing leader accompany the incoming leader to a meeting with the partner. Review the expectations and agreements between the org and partner.

Goals and on-Going Commitments Transition Tip: Outline any outstanding commitments of the organization for the upcoming year. For example, if the org received a grant to work on a specific project, list the committed project and timeline.

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