Table of Contents

*Adapted from Sam Houston State University Department of Student Activities ** This document was originally created by the Carolina Center for Public Service. Visit http://ccps.unc.edu/. *** Adapted from "Transition Checklist" and "Successful Transitions," created by Carolina Center for Public Service at UNC-Chapel Hill, 2006. ****Adapted from "Leadership Transition Checklist" created by Student Life Campus Involvement at University of Michigan, 2018.

Program Schedule

Statement of Purpose

Common Obstacles to Successful Transitions

Tips for a Successful Transition

Dinner and Discussion

Breakout Session 1

- Post-transition orgs: “impact” reflection activities
- Pre-transition orgs: “function” reflection activities

Breakout Session 2

- Post-transition orgs: abbreviated “function” reflection activities
- Pre-transition orgs: abbreviated “impact” reflection activities

Workshop Reflections

Student Organization Officer(s) Transitioning 101***

Tips for Successful Transitions:

- Have a transition planning meeting (congrats, you're here!)
- 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
- Fulfill outstanding obligations (especially financial)

Transitioning Methods:

- Documentation/record-keeping of all important information
- 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
- Reflection
  - On past events, future goals, critical questions

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 and use a to-do list!

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Outgoing Officer Reflection Questions*

The incoming officer(s) should ask the outgoing officer(s) each of the following questions. Feel free to use the space provided to record their responses or notable points. These questions are designed to help the incoming officer think critically about the impact of the role they are entering.

What aspect of the position did you like best?

What aspect of the position did you like least?

What was the most challenging part of the role and could you give a specific example of this/ How did you go about resolving this challenge?

What is one thing you wish you had done, or done better? How could you have done better?

What sort of legacy or reputation do you feel that you are leaving with your organization? Why?

Did you have the impact you wanted to on your organization? Would you change anything about your impact (make it less, more, different in nature, etc.)?

What skills have you developed or built on during your term as officer that you feel will be especially useful in the future?

What are some things you wish you had known before taking over the position?

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Incoming Officer Value Sheet

The outgoing officer(s) should ask the incoming officer(s) each of the following questions. Please use the space provided to record their responses. This activity is designed to help the incoming officer reflect on their values in relation to their position.

What are your top 5 personal values? (Ex. Honesty, punctuality, faith, determination, creativity, etc.)

How do you envision your values being expressed within your role? What is the importance of incorporating your values into your position?

What do you think will be the greatest challenge for you in this role? Why?

What do you think will be your greatest strength in this position? Why?

What is the legacy you want to leave behind when you transition out of this role? How do you want people to think about your actions/accomplishments?

What impact do you want to have on your organization through this role?

Value Action Plan (for incoming officers)

The incoming and outgoing officer should work together to fill out this sheet. It is designed to turn the incoming officer's expressed values and goals into workable action items that they can reference throughout their term of office.

Pick one aspect or trait of the legacy you want to leave. Write it below! (Ex. "organization", or "transparency")

List three tangible things (action items) you can do to accomplish this goal in your position:

1.
2.
3.

What resources will you need to accomplish the above actions? Name at least 3, and be specific! (This can be anything from specific information to physical resources.)

1.
2.
3.

How often/when will you need to implement your action items? Place an X or indicate an amount of time you will need to implement these action items on the timeline below!

Beginning of term — End of term

How can you keep yourself accountable for accomplishing these actions? List 2 ways.

Now use the above information to fill out the reference chart below. Use this chart for future reference!

Action Item:	Resources Needed:	Timeline for completion:	Accountability measures?

Role Description Questions*

The incoming officer(s) should ask the outgoing officer(s) each of the following questions. Please record their responses in the space provided. These questions are designed to help the incoming officer think critically about the functional aspect of the role they are entering.

Give a general description of your role.

If you had to boil down your position to 5 functions, what would they be? (Ex, "taking attendance", or "managing fines")

1.
2.
3.
4.
5.

What function of your role was most difficult and why? Did you/how did you accomplish it anyway?

What is the technical knowledge/skills did you need to possess to do this job well?

What other officers or groups can I expect to work closely with, and to what degree?

What should be done before the semester ends, during the break, and at the beginning of the new semester?

*

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Key Contacts**

List key contacts of the organization on campus and in the community.

CAMPUS CONTACTS

In the notes section, include extra information about the past relationship with this person/organization, and what the person can specifically help with, etc.

Staff/Faculty Advisor Name:

Phone:

Email:

Notes:

Campus Contact:

Name:

Position/Organization:

Phone:

Email:

Notes:

Campus Contact:

Name:

Position/Organization:

Phone:

Email:

Notes:

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COMMUNITY CONTACTS

Be sure to notify the community partner of the change in leadership. If possible, have the outgoing leader accompany the incoming leader to a meeting with the community partner. In this meeting, review the agreement between and the expectations of the student organization and the community partner.

Community Partner/Agency:

Contact Name:

Email:

Phone:

Notes:

Community Partner/Agency:

Contact Name:

Email:

Phone:

Notes:

Community Partner/Agency:

Contact Name:

Email:

Phone:

Notes:

Community Partner/Agency:

Contact Name:

Email:

Phone:

Notes:

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Finances**

CUSO ACCOUNT INFORMATION

Since the phasing out of SAFO accounts, Registered Student Organizations have two options for financial accounts. The first option is an off campus bank account, and the other is a CUSO account. CUSO stands for Carolina Union Student Organization Account. These can be useful if your RSO receives funding from a student governing body, student fees, a university department, or university development funds.

To use funds in a CUSO account, each transaction requires the completion of a CUSO form which can be found on the Student Organizations Finances page on Heel Life. There are six parts of the form: purchase type and payment, funding source, purchase details, event details, extra notes, and authorization. There are several categories of purchase type, and each require different additional documentation.

More information regarding the CUSO forms and accounts can be found on the Student Organizations Finances Heel Life page.

<u>Organizations may have multiple IDs as part of the financial process.</u>

● **CUSO ID#** - This number begins with a 4 and is used to identify student government funding. If you have received funding from Undergraduate Student Government or Graduate & Professional Student Federation, you will use this number for expenditures. As organizations receive funding from various student governing bodies, new IDs will be created on your behalf. There is no need to request one in advance.

● **ORG ID#** - This number begins with a 3 and is used to spend funds from a student organization's Student Enrichment Account. Funds that carried over into this account would have been from your organization's 13-account in SAFO. The use of these funds is restricted by the University, so please review the training and contact CUSO@unc.edu for any clarification or help needed.

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OFF-CAMPUS BANK ACCOUNT TIPS AND RECOMMENDATIONS

Your organization is responsible for its own finances and financial records, and all financial responsibility rests with the leadership of the student organization. The following banking tips and recommendations will help your organization keep accurate records and avoid financial issues:

● In order to maintain good financial control, more than one person should hold responsibility for financial transactions. It is recommended that the student organization require two signatures on any checks written on behalf of the group. It is encouraged that the organization's advisor has access to the checking account at all times for easier transition.

● Keep authorized signer contact information current with your bank. Do not simply hand over debit cards and checkbooks to new officers without informing the bank that a new person will be in charge of organization funds.

● All official banking documents should be scanned and stored electronically using the appropriate permission settings in the documents folder of your organization's page on Heel Life.

● All registered student organizations may apply for a mailbox in the Union to ensure that the group will have a consistent address to which bank statements can be mailed. RSOs interested in applying for a mailbox can contact the Office of Student Life & Leadership to secure a mailbox. It is imperative that **officers check this mailbox regularly.**

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REVENUE (Sources of Funding) EXPENSES (How Funding was Spent)

Student Congress Funds $_________ Food $_________ Fundraising Events $_________

Meeting Expenses $_________ Membership Fees $_________ Supplies $_________ Grant Funds $_________

Printing $_________

Other Funds

Copying $_______________ $_________ Other Program Expenses: _______________ $_________

______________ $_________ _______________ $_________ ______________ $_________

_______________ $_________ ______________ $_________

Total Revenue $_________ Total Expenses $_________

Surplus or Deficit = $______________ (Revenue – Expenses)

ACCOUNT INFORMATION (account numbers, balance, etc.):

EIN Number:

FUNDING SECURED FOR NEXT ACADEMIC YEAR *If funding source is a grant, attach a copy of the

grant proposal and the grant agreement!

Committed funding of $____________ Funding to be used for:

____ Source of funding

(organization):____

Committed funding of $____________ Funding to be used for:

____ Source of funding

(organization):____

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Login Information Sheet

Account Name:	Username:	Password:	Notes:

Outgoing Officer To-Do List*

☐ Gather and organize all documents and files

☐ Finish all necessary correspondence (letters, e-mail, phone calls)

☐ Prepare year-end report and evaluation (Annual Report)

☐ Review your constitution, bylaws, written material, and other documents needing revision.

☐ Develop action plan and timeline for new officer transition, including but not limited to:

- ❏ Necessary meetings attended and conducted by officer
- ❏ Sharing tasks and duties with other officers and/or members
- ❏ Introductions to key individuals
- ❏ Required meetings and trainings workshops
- ❏ Financial Information

☐ Update Heel Life with information of new officers and their positions

☐ Annual Registration Process

Fall Registration Period (August 15th – September 30th) or Spring Registration Period (December 1st – January 31st)

- ❏ Send two officers (president and treasurer or a proxy) to an Officer Orientation Session during appropriate registration period

- ❏ Complete online registration form located in Heel Life, select 'Organizations', select 'Register an Organization' on the left, search the organizations name and select 'Re-register' button next to the org

- ❏ Instruct the advisor for the organization to complete the online Advisor Agreement Form

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Incoming Officer To-Do List*

- [ ] Obtain a copy of the constitution, by-laws, chapter policies, and procedures
- [ ] Obtain an role-specific description in writing
- [ ] Know the goals and objectives of the previous officer
- [ ] Prepare your goals and objectives for the upcoming term of office
- [ ] Obtain a status report of all ongoing projects you will be taking over
- [ ] Obtain the financial records/budgets relating to your position
- [ ] Organize all of your necessary materials both digitally and physically
- [ ] Obtain the accounts, listservs, usernames and passwords you will need for the term
    - [ ] And know *how* to operate the accounts!
- [ ] Obtain any form, presentation, or letter templates you may need
- [ ] Develop major action items and a timeline for completing them

*Adapted from "Leadership Transition Checklist" created by Student Life Campus Involvement at University of Michigan, 2018.