

## Navigating Organization Transitions

As an advisor, a very important time of year is the point at which your students transition their leadership. Their constitution should have some descriptions about their process for this, and if they do not happen to have it in there, we suggest having them add their process, so it is in writing.

Some organizations transition in January, while others transition at the end of Spring Quarter. When they transition is up to each group; though creating a fair and efficient process is important. [Here](#) is a suggested timeline for the process. All members should know what positions are available and how to apply. The selection process should entail an opportunity for an application with executive board review/interviews and/or an appeal to the entire organization for a vote.

When new members are elected to their roles, it is important for you to know who the new leaders are, and especially who will be taking on the President, Vice President and Treasurer roles, as they have responsibilities with re-registering the organization in Spring of every year for the following year, and attending Org 101 training with the Office of Student Engagement in August ahead of Fall Quarter. Org 101 teaches leaders about the financing of their organization, how to plan and execute events, and how to manage their organization on Crimson Connect and more. Any student organization leader who wishes to purchase items with a school-issued purchasing card must attend the training and complete the finance quiz.

### How can you help in the transition process?

- Meet with outgoing and incoming leadership to go over plans for the year
  - Meeting times/days/locations and flow
  - Set goals and expectations for the year (individual and organizational)
  - Recruitment plans and member retention strategies
  - Look at budget and determine how you plan to spend it
    - If they use it all, they can request more through USG
- Ensure leaders facilitate a transition meeting between old and new leadership
  - An example transition document is below. Feel free to copy and use!
- Assist President/Vice President with the Re-registration process each Spring
- Determine professional development needs and assist with a plan to get executive leadership to a level that will lead them to success
  - Communication
    - Emails, in-person, social media, etc.
  - Organization and time management
    - Calendar usage, using Teams/One Drive, prioritization
  - Managing conflict and accountability
    - Have a plan for managing various conflict scenarios that could arise

- Ensure they attend Org 101 and understand all the information

## Sample Transition Document

### Transition Document for [Position Title] [Year]

**Date:** [Current Date]

**Outgoing Officer:** [Outgoing Officer's Name]

**Incoming Officer:** [Incoming Officer's Name]

**Position:** [Position Name]

#### **Note To Future [Position Title]:**

Congratulations on being selected for the [Position Title] role! You have so much to look forward to. During my time in the role...etc.

Thank you for your dedication and commitment to [Organization Name]. I am confident that you will excel in your new role!

Sincerely,

[Previous Chair]

#### **Position Overview:**

Role Responsibilities

- [List primary duties and responsibilities]
- [Include any specific expectations, steps for completing, and/or goals]

Tips for Success

- [Tip 1]
- [Tip 2]
- [Tip 3]
- [Tip 4]

#### **Administrative Information:**

Budget number(s)

## Annual Calendar/Schedule

- Month by month details of what happens logistically, and when this role should perform certain duties

## Important document links, descriptions, and locations

- Document Storage: [Google Drive, Dropbox, etc. – link or location]
- Software/Tools: [List of software/tools used, with login information if applicable]
- Templates: [Links or location of important templates, e.g., event planning, budget forms]
- Other Examples: CCOM basement storage locker code, P-card and finance procedures, etc.

## **Communication:**

### Communication Expectations:

- Example - “Respond to emails within 48 hrs of receiving;” define treating each other with respect; who is responsible for what type of communication, etc.

### Primary Communication Channels: [Email, Teams, Group Me, etc.]

### Internal Contacts:

- President: [Name, email, phone number]
- Vice President: [Name, email, phone number]
- Treasurer: [Name, email, phone number]
- Etc.

### Key External Contacts: [List of important contacts with their roles and contact details]

- Examples - Building Managers (for building they hold meetings./host events in), past presenters or speakers, Advisor(s) contact information, previous student leadership, DU Facilities, DU AV/Tech, other student organizations we have collaborated with, etc.

## **Tips and Advice:**

- [Tip 1]
- [Tip 2]
- [Tip 3]
- [Tip 4]

At the end of the year, make a copy of this document, change the year/names, and present it to the incoming person who will be taking over for you after a transition meeting.

Outgoing Officer Signature: \_\_\_\_\_

Incoming Officer Signature: \_\_\_\_\_

Date: \_\_\_\_\_