A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves.
Lao Tzu

A key component to the success of your organization, and its leaders, is the transition of important information and materials. You have the ability to help the new leaders be effective by implementing a quality transition program. Pass on your results. The new leaders will thank you and you will know you fulfilled your duties. Use this checklist to create the following:

I. Preparing and passing the binder (before elections are held)
II. Transition meeting(s) for you and your successor (once elections are held)
   * Invite your successor to office hours and meetings; on-the-job training is encouraged*
III. Organizational transition meeting/gathering (recap and transition)

I. Preparing and Passing the Binder (before elections are held)
All outgoing positions need to have some sort of record keeping to help the new officer fulfill the role to the best of their abilities. Utilize this outline to develop the binder. It is ideal to complete the binder prior to elections. The pass-down binder is the first step in the transition process. Start working on these notes to pass down as soon as you take office, and keep it up to date with different events as they happen throughout the year to ensure accuracy.

1. Welcome Letter
   a. Personal letter of encouragement, what to look forward to
   b. Position highlights, fondest memory, and potentially future goals

In this box, jot down ideas for what your letter might include:
2. Organizational/Governing Documents
   a. Constitution & By-laws (submitted via Purple Post)
   b. Mission Statement
   c. Current Year’s Vision Statement
   d. Organization goals
   e. University policies & procedures

Take some time to write out what you believe the following to be for your organization:

Most important things to remember regarding the governing documents:

_____________________________________________________________________________________

Mission Statement (What purpose does your organization serve?):
_____________________________________________________________________________________

Current year’s vision statement (What specific direction did you take the organization this year?):
_____________________________________________________________________________________

What goals did you have this year? Any ongoing goals that transfer from year to year?
_____________________________________________________________________________________

Any specific organizational policies that you found to be especially helpful? Or hindering?
_____________________________________________________________________________________

Other comments regarding organizational vision or governing documents:
_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

Visit us at wiu.edu/soc
3. Budget
Based on your position, the budget may be tied directly to event/project documentation; if your budget is more generic create its own section
a. Accounting of how allocated funds were spent
   i. Print out summary of budget, allocation and expenses
   ii. Print out detailed expenses for events/projects
b. Funding sources & Expenditure Authority
   i. List funding sources- Council on Student Activity Funds (CSAF), fundraising, donations, co-sponsorship, etc
   ii. Who has to approve expenditures from your budget

What was your budget this year? ___________________________________________
What is the current balance? ____________________________________________
Where do you receive funding? (Dues, CSAF, etc):
______________________________________________________________________

What route do you go through to approve expenditures?
1. ________________________________________________________________
2. ________________________________________________________________
3. ________________________________________________________________
4. ________________________________________________________________

What annual expenses do you have (annual event planning, etc)?
1. ________________________________________________________________  Cost:_________________________
2. ________________________________________________________________  Cost:_________________________
3. ________________________________________________________________  Cost:_________________________
4. ________________________________________________________________  Cost:_________________________
5. ________________________________________________________________  Cost:_________________________
6. ________________________________________________________________  Cost:_________________________
7. ________________________________________________________________  Cost:_________________________
8. ________________________________________________________________  Cost:_________________________

4. Position description
a. A copy of the actual position description, include duties, time commitments, length of position (Take it straight from the governing documents and add any additional unwritten tasks at the bottom)
b. Clarify what the job description means
   i. Give context to the duties & responsibilities
   ii. Explain what it is you do
c. Suggest changes in the job description based on your experience

Unwritten duties and expectations/Areas for change:
1. ________________________________________________________________
2. ________________________________________________________________
3. ________________________________________________________________
4. ________________________________________________________________
5. Position timeline
   a. 1-page summary of position, break into months/quarters based on position
   b. Two week crash course, what to expect during those first two weeks in the position
   c. Calendar of events, timeline for planning events/important projects, deadlines
   d. Cycle of the position, indicating busier times, work flow

   Fill in roughly what was done in the following sequence.

   Time between being elected and end of academic year:

   Over the summer:

   August:

   September:

   October:

   November:

   December:

   January:

   February:

   March:

   End of the Year:
6. Event/project documentation  
   a. Records of each event/project on Purple Post. Print out anything you deem important enough to be in the binder, some ideas might be:  
      i. Promotional material (flyer, website layout/design, logo)  
      ii. Timeline, planning of and day of  
      iii. Number of attendees  
      iv. Vendors used  
      v. Materials/decorations to be used again (banners, centerpieces)  
   b. SWOT analysis & reflections (lessons learned)  
   c. Evaluation/survey summaries from committee/attendees

7. Contacts & Resources  
   a. Organizational membership & contact sheet  
   b. Key people helpful in fulfilling responsibilities and contact info  
      i. On campus staff & faculty  
      ii. Guest speakers  
      iii. Vendors  
      iv. Yourself  
   c. Record of materials bought or needed for position/events, storage location

Create a contact reference guide here:

<table>
<thead>
<tr>
<th>Your Contact Information: ________________________________</th>
<th>Preferred contact: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advisor: ________________________________ E-mail: ____</td>
<td>Phone: ________________________________</td>
</tr>
<tr>
<td>Second Advisor: __________________________ E-mail: ______</td>
<td>Phone: ________________________________</td>
</tr>
<tr>
<td>Guest Speaker(s): __________________________ E-mail: __________</td>
<td>Phone: ________________________________</td>
</tr>
<tr>
<td>Guest Speaker(s): __________________________ E-mail: __________</td>
<td>Phone: ________________________________</td>
</tr>
<tr>
<td>Vendors: ________________________________ Phone: ________________________________</td>
<td></td>
</tr>
<tr>
<td>Vendors: ________________________________ Phone: ________________________________</td>
<td></td>
</tr>
<tr>
<td>Vendors: ________________________________ Phone: ________________________________</td>
<td></td>
</tr>
<tr>
<td>Other important contacts: __________________________ E-mail: ______</td>
<td>Phone: ________________________________</td>
</tr>
<tr>
<td>Other important contacts: __________________________ E-mail: ______</td>
<td>Phone: ________________________________</td>
</tr>
<tr>
<td>Other important contacts: __________________________ E-mail: ______</td>
<td>Phone: ________________________________</td>
</tr>
<tr>
<td>Other important contacts: __________________________ E-mail: ______</td>
<td>Phone: ________________________________</td>
</tr>
<tr>
<td>Other important contacts: __________________________ E-mail: ______</td>
<td>Phone: ________________________________</td>
</tr>
</tbody>
</table>

Visit us at wiu.edu/soc
8. Reflection and Transformative Moments
   a. Share lessons learned (working with others, delegating, communicating with a large constituency- what worked & what didn't)
   b. Document goals- list accomplishments, areas of improvements, and unfinished goals
   c. Recommend goals/ideas to be continued and why

<table>
<thead>
<tr>
<th>Reflect &amp; answer the following questions based off of your experience with the organization this year:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why did you want this position?</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>What did you get out of this position?</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Knowing what you know now, what would you do differently?</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>How has your work with this organization changed your life?</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>What were goals you accomplished this year? How did you go about completing them?</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>What goals would you set for next year based off of your experiences?</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>What is one thing you wished someone would have told you regarding your role?</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>How do you see your experience as helping you in your future (career, personal, etc.)?</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

9. Other Essentials
   a. Accounts & passwords (email, website, etc.)
   b. Membership/Subcription (Facebook, Twitter, Survey Monkey, magazine, organization membership)
   c. Update PurplePost Roster with new officers!

<table>
<thead>
<tr>
<th>Type of service (email, website, etc)</th>
<th>Username</th>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
II. Transition Meeting: A Checklist for Outgoing Leaders (once elections are held)

The second step in the transition process is face-to-face individual meetings between the outgoing and incoming leaders. It is critical for a conversation to ensue, giving the successor an opportunity to understand the realities of their new role.

Utilize this checklist when planning a transition meeting. The checklist compliments the transition binder but includes additional items as well. The face-to-face conversation should give perspective to the incoming leaders. Some positions may require multiple meetings, and the checklist has a suggested breakdown. If meeting more than one time provide the new leader the pass-down binder for review between meetings.

Invite new leaders to office hours & meetings. Allow time for job shadowing. Actual on-the-job interaction & training is highly recommended.

1. Information about the Organization:
   Pass-down binder sections 1-3
   ___ Review organization history (partner with Advisor to extend beyond your viewpoint)
   ___ Review organization constitution, by-laws and other governing documents
   ___ Review goals and objectives from the last year
   ___ Share key constituent contact information- newly elected members, continuing/returning members, etc. (phone numbers, email, etc.)
   ___ Review University policies and procedures
   ___ Review organization budget, event/project specifics
   ___ Provide financial information such as accounts, fundraising information and copies of completed requisitions
   ___ Review PurplePost.wiu.edu; update roster to give incoming officers access to learn how to utilize the tools

2. Position Roles and Printed Materials
   Pass-down binder sections 4-9
   ___ Review and pass on old records, binders, files, notebooks and correspondence
   ___ Review job descriptions
   ___ Review written expectations
   ___ Clarify roles and responsibilities in meetings
   ___ Review meeting structure, timing, agendas and minutes
   ___ Review calendars/timelines together (activities, meetings, deadlines)
   ___ Review status reports for continuing projects
   ___ Review evaluations for completed projects; include logistics, planning committee duties, fliers, budget, stakeholders
   ___ Pass on financial records, mailing lists, email accounts, websites, social networking site details, listserves, community contacts
   ___ Discuss your achievements & failures- be real!
   ___ Share list of organization materials- books, magazines, t-shirts, membership to national affiliations
III. Outgoing / Incoming Leadership Gathering (Recap & Transition)

The third and final step in the transition process is the group meeting/gathering. It is important to bring together the larger group in order to pass the torch, to extend good will to the successors and to pass along pearls of wisdom. The outgoing leaders are able to reflect upon their experience, individual and collective, and the new leaders are able to hear stories of success and challenge.

1. Plan a casual 1-2 hour meeting/gathering for (depending on group size) the outgoing leaders, incoming leaders, advisor(s)
2. Meeting/gathering agenda
   a. Icebreaker, engage everyone with an active icebreaker
   b. Introductions
      i. Outgoing & incoming leaders introduce each other (assuming the 1:1 transition meetings have already occurred)
      ii. Outgoing leaders share a highlight from the year
      iii. Incoming leaders share what they are looking forward to
   c. Passing the Torch
      i. Outgoing leaders share the lessons learned, offer as advice or pearls of wisdom
      ii. Outgoing leaders collectively share achievements (showcase teamwork)
   d. Accepting the Torch
      i. Incoming leaders ask questions of the outgoing leaders
      ii. Open dialogue
   e. Social
      i. Plan time to allow mingling and group interaction
      ii. Having time to bond with outgoing and incoming executive board allows the incoming board to transition better and develop crucial connections to keep the organization successful
      iii. May consider having dessert or snacks present
I. **LEADERSHIP TRANSITION: A CHECKLIST FOR NEW OFFICERS**

This checklist is designed for new leaders to use as they begin their respective roles. This can be used while meeting face to face with the outgoing leader and when beginning to meet with your fellow new leaders.

1. **Getting Started- New Leaders**
   - Meet with your Advisor(s); clarify expectations, roles & responsibilities
   - Update officer contact info on Purple Post, websites, offices, social media
   - Send updated contact info to advisor(s), Student Involvement, key constituents
   - Understand present and future programs
   - Review pass-down binder(s)
   - Begin to develop a master calendar with meetings, programs, events
   - Become familiar with pass down binder/resources; utilize the outgoing officers
   - Re-register organization

2. **Leadership Training: Some Helpful Hints**
   - Establish when new leaders officially begin their position(s)
   - Get to know each other, as leaders & as people
   - Plan training in conjunction with Advisor
   - On-the-job training/essential functions immediately
   - Develop meeting structure, formation of agendas, dissemination of minutes/outcomes
   - Discuss meeting times (place, time and advertisement)

3. **Goal Setting-New Leaders**
   - Evaluate goals, achievements & failures of previous year; involve Advisor as for broader insights
   - Plan group goal setting session
   - Establish goals (officer, individual and organization {with input from membership}), if elected, goals must fulfill the platform you presented
   - Present officer/leadership goals to membership, post in office for easy review
   - Help prioritize organization goals with entire membership

4. **Important Information & Resources**

   Your Advisor is able to provide training/insight, especially the training available.
   - Funding avenues (CSAF, fundraising)
   - Event planning, publicity and fundraising
   - Goal setting and follow through, SMART goals
   - Leadership workshops
   - Officer Transition workshops
   - Meeting management
Getting Started- New Leaders

Leadership Training: Some Helpful Hints
Goal Setting-New Leaders (SMART GOALS*)
*SMART goals are Specific, Measurable, Attainable, Realistic/Relevant, and Time-Bound.

Important Information & Resources
1. SWOT Analysis

You can use a SWOT analysis to identify and analyze the Strengths and Weaknesses of your organization, as well as the Opportunities and Threats revealed by the information you gather from event evaluations. A SWOT is a strategic planning tool used to evaluate the internal and external components of a project or in any other situation of an organization or individual requiring a decision in pursuit of an objective.

**Why use it?** To develop a plan that takes into consideration many different internal and external factors, and maximizes the potential of the strengths and opportunities while minimizing the impact of the weaknesses and threats.

**When to use it?** Use it while developing a strategic plan or planning a solution to a problem, use it as an evaluation tool after an event/program/project.

**SWOT example:**

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>YOUR ORGANIZATION</td>
<td>EVENT TITLE</td>
<td>INSERT DATE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
<th>OPPORTUNITIES (FOR GROWTH)</th>
<th>THREATS (PROHIBIT GROWTH)</th>
</tr>
</thead>
<tbody>
<tr>
<td>•</td>
<td>•</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2. Event Planning

Event Planning Summary: HOMECOMING PARTICIPATION
Officers: President and Social Chair  Date: October 11-12, 2013
Location: Brophy Hall  Theme: Rocky Games: Western Is United

PLANNING:
1. Set tentative date of the event based on previous year’s feedback, start of school
2. Reserve space & set up needs
3. Determine budget for the event (see below)
4. Complete paperwork for food, entertainers; place orders
5. Work with OSA or DPS for help with publicity
6. Contact involved organizations (clubs, departments, facilities, etc.) re: date, time and details
7. Assess volunteer needs, set duties; set expectations with other officers- who will attend, roles & responsibilities
8. Arrange with the Union for any tabling needs: arrange for banner to be created at least 4 weeks in advance, create fliers for table, purchase pens/give-aways to promote events (optional)
9. Confirm officer attendance one week prior to event and duties assigned (set-up, take-down, tabling assignments); email task list/assignments to all officers
10. Organize materials for volunteers; create task lists to reduce confusion (especially if you are tasked with other duties on the day of the event)
11. Confirm arrival/set-up for all vendors
12. Arrange for day-of materials the night before the event

STAKEHOLDERS:
1. Determine target audience- who benefits, who is affected by the event
2. Communicate with campus entities- OSA, facilities, Westec, etc to make sure all logistics are covered
3. Ensure all co-sponsoring parties are adequately involved in decision making, including date

BUDGET:
1. Determine budget- overall and breakdown of categories; communicate if others are helping plan
2. Follow approval guidelines (especially for CSAF funded groups)
3. Track expenses- encumbered and actual expenses and form of payment
4. If co-sponsoring, determine in advance which dept. is responsible for expenses
DAY OF EVENT:
1. Be on time for set-up; assist others in accomplishing their duties
2. Have all vendors arrival times & phone numbers on hand
3. Facilitate set-up, direct people to appropriate spaces
4. Have fun!
5. Ask attendees to evaluate the event
6. Ensure clean up is done correctly

EVALUATION:
1. At first officer meeting post-event evaluate the process using the SWOT form; focus on the event outcome, fulfillment of committee member expectations, & review attendees’ evaluations
2. Document process- summarize all aspects of the event; prepare report for your pass-down binder NOW
3. Finalize expenses, communicate to treasurer/accounting and document for next year’s officer

Additional/Important Notes and Extra Work Space:
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________