



# SAIL Student Organization Transition Handbook

Adapted from Buffalo State Student Leadership & Engagement Office 2019

Student Activities, involvement, & Leadership Office  
(SAIL)  
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## **SAMPLE TRANSITION BINDER OUTLINE**

Below is a listing of information and documents that are recommended to include while building a transition binder. Depending on your club or organization you will need to adapt the following outline to fit your needs.

### **1. Club Center Contact Information**

- a. SAIL information and Contacts
- b. Quick Resources and Referrals
- c. SAIL Website

### **2. Club History**

- a. How did you become a club? Who is out governing body (BSO, ISC, BSM)?
- b. When was the club/organization founded?
- c. Important Alumni Information

### **3. Club Contact Information**

- a. General club contact information
  - I. Social Media account information & password
  - II. Website account information & password
  - III. General club email address & password
- b. Current executive board's contact information
- c. Member & officer contact list
  - I. Have them added to their governing body's Canvas page and EMS
- d. Previous executive board's contact information
  - I. Member & officer contact list
- e. Advisor information
  - I. Department, office location, & contact
  - II. Role on campus
- f. Other organizations / Community Liaisons:
  - I. List of agencies + contact info.
  - II. Funders (List of companies + contact info.)

### **4. Club Constitution**

- a. Note of any recent changes and describe the process
- b. Bylaws

### **5. Calendar of Events/Annual Events/Signature Events**

- a. How to reserve a space
- b. Notes on annual/signature events with:
- c. Timeline of event
  - I. Methods of publicity used
  - II. Important contacts (partnerships and/or sponsorships)
  - III. Location information and contacts
  - IV. Media coverage and contact information
  - V. Budget for event/ year
  - VI. Improvements to be made

## **6. Public Relations**

- a. Promotional/recruitment flyers
- b. Copies (hard and/or electronic of past fliers)
- c. Additional public relations materials
  - I. Alternative methods of recruitment used
  - II. Pictures

## **7. Financial Overview**

- a. Current Budget and Allocation Process
- b. Finance cheat sheet/ Budget Tracker
- c. Information on grants and other funding

## **8. SAIL Registration**

- a. Instructions
- b. Club Registration
- c. End of the Year Reports

## **9. Additional Information**

- a. Awards & Recognition
- b. Forms
- c. Templates

## TRANSITION OVERVIEW

*A successful leadership transition process should be carefully planned out. There are four key phases to a transition; Pre-Transition, Preparing for the Transition, Passing the Torch and Thinking Ahead for the fall. The bulk of the transition will occur in the spring semester but it's important to carry out the transition through the summer to be fully prepared for the fall semester.*

### Phase 1: Pre- Transition

The following should have already been accomplished:

- Elect your new Executive Board- make sure to hold elections in April to leave yourself enough time for a successful transition (4 weeks at least).
- Finish all necessary correspondence (paperwork, letters, emails) with SAIL.
- Ensure all Financial Forms/ receipts have been submitted.
- Develop action plan and timeline for new officer transition

### Phase 2: Preparing for the Transition

Complete the following:

- Executive Board Contact information for new academic year (including name, email, phone numbers) updated on Engage.
- Introduce all new E-Board members to advisors

Preparing information for the incoming E-Board:

- Invite the incoming executive board members to attend a meeting led by the exiting executive members- this will help new E-Board members to understand the roles and responsibilities of their respective leadership positions.
- Organize files (paper & electronic) to ensure proper documentation
  - Create transition binders. Each incoming officer should be provided with an organized binder whether physically or digitally.
  - Give your predecessor a tour of the binder- don't just pass it off!
  - All officers should have a copy of the following:
    - Executive board contact list
    - Bylaws
    - General "job" description
    - Key Administration Contacts/ Advisor Info
    - Goals from the previous year and End of the year report

### Phase 3: *Passing the Torch*

Schedule Transition Meetings:

- Ideally, the outgoing President/Vice President/ Treasurer should meet one-on-one with the incoming President/Vice President/Treasurer and include the advisor during the spring semester.
  - Topics of discussion:
    - Calendar
    - Goals for next year
    - Past, current, and future issues
    - Financial status of club/organization
    - Expectations of roles
- Hold a joint meeting for the outgoing and incoming executive board. Think of this as an adjustment period.
  - Suggestions for agenda:
    - Introductions
    - Review of bylaws
    - Review the goals and accomplishments of current year
    - Handle unfinished or pressing business
    - Break into one-on-one meetings for each position

If time permits, hold a transitions retreat with the incoming executive board. As part of your retreat include team builders to foster good working relationships. Team Builders will allow you to learn a great amount about your organization and is a stepping stone to building a strong team.

- Outcomes of holding a retreat:
  - Increase and foster open and honest communication
  - Builds positive social relationships
  - Develop trust and mutual support
  - Builds respect...appreciation of differences
  - Builds pride for your group
  - Use the uniqueness of members to accomplish goals

### Phase 4: *Thinking Ahead for Fall*

Fall can be a busy time of the year! Plan ahead and think of the following items over the summer so that you are fully prepared for your new leadership position.

- Introduce E-Board members to advisors and other key administrators
- Prepare for M-Climb, Celebration of Mines, Fall-Kick Off Outings, and Fall Summit
- Update bylaws yearly, leadership descriptions to make sure that they accurately reflect the organization.
- Informal meetings to encourage group bonding and support
- Review rosters on engage and update as needed
- Update calendar
- Create timelines

## OUTGOING EXECUTIVE BOARD TRANSITION DISCUSSION TOPICS

### Goals:

What were the goals, and how well did we do on each goal? Feel free to share BSO forms from the year.

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Which goals should be continued?

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Which goals should be altered?

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Which goals should be dropped?

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### Programs and Activities:

What activities and programs did we host?

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How effective was each program?

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Did we do any community service activities?

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Were the programs and activities consistent with group goals?

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Which activities should be continued and which should be dropped?

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### Membership:

Do we currently have just enough, too few, or too many members (in light of the group's goals)?

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How effective were our membership recruitment efforts, if any?

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Are the members actively involved in the operation of the club (including decision making, planning, implementing, and evaluating)?

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Are members enthusiastic about the activities and motivated to work towards the group goals?

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### Officers and Organizational Structure:

Do officers understand their responsibilities and roles within the organizational structure?

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Did the officers operate as a team or could cooperation between officers be improved?

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Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?

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How would the general membership evaluate the effectiveness of the officers?

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How would the officers evaluate the effectiveness of the officers? What could be improved?

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### Organizational Operation:

Was the budget managed properly? What was our BSO/BSM/ISC allocation? What is our index number?

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Were meetings run effectively?

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Was the frequency of meetings appropriate?

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Do we experience scheduling conflicts with other groups or activities?

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Additional Notes:

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## INCOMING E-BOARD QUESTIONNAIRE

List 3 things that made you want to run for this office and why:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

List 3 new ideas that you would like to implement for your position this year:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

List 3 important foreseeable problems in your position:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

List possible solutions to the above 3 problems:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Please think through and respond to the questions regarding your responsibilities. Think of this information as a to-do list- it will be very helpful to your successor.

1. Things specific to the position I want to know about (forms, duties, etc.)
2. Things I should do before the semester begins...
3. People (positions) that I should get to know...
4. Services that I need to know about...
5. Things I need to know about working with my advisor...
6. Other questions I wanted answered...

## MEMBER & OFFICER CONTACT SHEET

This is for internal use only but could be helpful to keep track of contact information.

### Organization Information

Organization Name: \_\_\_\_\_  
Organization E-mail: \_\_\_\_\_  
Organization Web Site: \_\_\_\_\_  
Number of Current Members: \_\_\_\_\_

### Primary Contact Person

Name: \_\_\_\_\_  
Title/Position: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Email Address: \_\_\_\_\_

### Officers

If you have additional officers, please attach a list to this form.

Name: _____	Name: _____
Title: _____	Title: _____
Email: _____	Email: _____
Name: _____	Name: _____
Title: _____	Title: _____
Email: _____	Email: _____
Name: _____	Name: _____
Title: _____	Title: _____
Email: _____	Email: _____
Name: _____	Name: _____
Title: _____	Title: _____
Email: _____	Email: _____
Name: _____	Name: _____
Title: _____	Title: _____
Email: _____	Email: _____

### Advisor

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Campus Address: \_\_\_\_\_  
Phone Number(s): \_\_\_\_\_  
Email Address: \_\_\_\_\_

## HELPFUL WEBSITES

SAIL Office: [www.mines.edu/Student-activities](http://www.mines.edu/Student-activities)

Current Club SAIL Resources/ Re-registering: <https://www.mines.edu/student-activities/resources/>

Reserving a Space on Campus: <http://events.mines.edu/EmsWebApp/Default.aspx>

Purchasing Request:

<https://helpcenter.mines.edu/TDClient/1946/Portal/Requests/ServiceCatalog?CategoryID=18317>

Your organizations Head Quarter Website (if applicable):