



# **Leadership** **Transition** **Handbook**

Grand Valley State University

2009-2010

# Table of Contents

1. Transitions Checklist.....	3-4
2. Transitions Binder.....	5-6
3. Outgoing E-board Transition	
a. Discussion Topics.....	7-8
b. Worksheet.....	9
c. Toughest Challenges.....	10
4. Incoming E-board Transition	
a. Executive Board Contract.....	11
b. Questionnaire.....	12
c. Self-Check Ruler.....	13
5. Other Transition Materials	
a. Goal Sheet.....	14
b. Projected Needs.....	15
c. Contacts to Remember.....	16
d. Important Information.....	17
e. Recruitment Tools and Techniques.....	18

# Transitions Checklist

## *A Thorough Leadership Transition for 2009-2010*

### **Phase 1: Pre- Transition**

The following should have already been accomplished:

- Elected your Executive Board for 2009-2010
- Submitted your budget request for Student Senate funds
- Re-register your Student Organization through Stuey if necessary
- Reflecting on 2008-2009: Provide an opportunity for outgoing officers to reflect on their success and put “closure” to their experience with the organization

### **Phase 2: Preparing for the Transition**

Complete the following:

- Executive Board Contact Info for 2009-2010
- President/Vice President Summer Contact Info
- Birthday list
- Introduce all new President/Vice Presidents to advisors

Preparing information for the incoming executive board:

- Invite the incoming executive board members to attend a meeting lead by the outgoing executive meeting (in order to understand the roles and responsibilities of their respective leadership positions)
- Organize files (all paper and electronic files) to ensure proper documentation
- Create transitions binders (See “Transition Binders” for more ideas)
  - Each incoming officer should be provided with an organized binder
  - 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
    - Constitution/ by laws
    - General description of responsibilities
  - For the Chair/ Vice Chair
    - Helpful documents:
      - Key Administration Contacts
      - “Self Check Ruler”
      - “Toughest Challenges”
  - Create an end of year “report”/ evaluation

### **Phase 3: Passing the Torch- Completing the Transition**

Holding Transition Meetings:

- Ideally, the outgoing President/Vice President should meet one-on-one with the incoming President/Vice President (and include advisor)
  - Topics for Discussion
    - Calendar
    - Goals for 2009-2010
    - Financial status of the organization

- Past, current, and future issues
  - Tasks to do and procedures to accomplish them
  - Expectations of each other as President/Vice President
- If time permits, hold a joint meeting for the outgoing and incoming executive board.
  - Think of this as an overlap period. “Just as tag-teams hand off a baton, outgoing officers need to officially hand-off responsibilities to their successors.”
  - Suggestions for the agenda:
    - Introductions
    - Review of constitution
    - Review the goals and accomplishments of current year (*so that the new executive board is aware of the things the group wanted to accomplish*)
    - 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 a 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
    - Knowing the skills, abilities, needs, and fears of your membership
    - Fostering open and honest communications
    - Builds positive social relationships
    - Increase communication
    - Develop trust
    - Provides mutual support
    - Builds respect...appreciation of differences
    - Builds pride for your group
    - Use the uniqueness of members to accomplish goals
  - Talk about commitment and expectations

**Thinking ahead for Fall 2009** (*Keep on your radar this summer*)

- Introduce eboard members to advisors & other key administrators
- Preparing for Campus Life Night
- Update constitution & job descriptions to make sure that they accurately reflect your organization
- Informal meetings to encourage group bonding and building rapport
- Review membership lists and update them
- Update calendar
- Create timelines
- Attend Max It Out! and share the information presented with your group
- Utilize the SOC’s resources
- Membership review (recruitment, retention, growth and development of leadership within organization, overall group dynamics)

# Transition Binders

Each incoming officer should be provided with an organized binder of electronic and paper files. 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
- Constitution/ by laws
- General description of responsibilities

**For the President/ Vice President** (Helpful documents from S&A Council)

- Key Administration Contacts
- "Self Check Ruler"
- "Toughest Challenges"

President

- List year's calendar of events
- Important contact info (administration, contacts for co-programming with, affiliated professional or cultural associations in the community, etc)
- (*See below for more details*)

Vice President

- Pertinent miscellaneous information (ie. Committee documents)

Treasurer

- Copy of all receipts, forms, etc.
- Copy of last year's Student Life budget request and any reserve requests
- Copy of this year's Student Life budget request

Secretary

- Detailed information on how to access the club email and or/listserv
- Detailed information on how to book rooms/venues around campus

Public Relations

- Instruction on where to purchase banners (UPO)
- Instructions on how to submit information to the Lanthorn, the MAX, CSLC Times, Events Calendar, and other areas of advertisement

Historian

- Last year's scrap book, etc

Webmaster

- Info page with website access codes, passwords, and layout plans

## **People**

Organization Membership History List [with contact info]

- Who is involved?
  - E-board Members *Summer Contact Info*. (Past, Present, Future)
  - Past General Members (Previous Year)
- How did we contact them? Listserv, e-mail, etc
  - How to access listserv/e-mail account?
  - Who has access to this? Who needs access, training? Or outreach/liaison chair?

- -Username/password?

#### Campus Contacts

Other organizations (Who is the current/incoming chair/president? )

- Administrative
  - i.e. reservations, copy center, etc.
  - Where are they located?
  - Contact info

#### Community Liaisons

- List of agencies + contact info.
- Funders (List of companies + contact info.)
- Press (Name/type of publication(s) + contact info.)

### **Documentation and Methodology**

Organization Constitution/By-Laws [include a copy]

- Were changes made recently?
- Do any updates need to be made?

#### Recruitment Fliers and Methods

- Copies [hard and/or electronic] of past fliers
- How many were printed?
- Where were they hung?
- Alternative methods of recruitment used (i.e. Facebook, etc.)

#### Advertisements and previous press

- Which publications? Include contact info
- How much did they cost? Copies of ads run in the past

#### Grants and other funding

Miscellaneous info (Account numbers, locator codes, etc.)

### **Key Activities and Initiatives**

List of events put on by the organization

- Purpose of each event
- Checklist with timeline (rough) of what needs to be done for each event
  - Methods of publicity used
  - Important contacts
  - Sponsorship info and contacts
  - Location info and contacts
  - Media coverage and contact info
  - Budget for the event
    - Was there a request for supplemental Student Senate funds?
    - How much money did you receive?
- Lessons learned: what improvements need to be made?

### **Personal Notes and Observations**

- What worked
- What didn't work
- Challenges
- Key notes for the future/ new ideas to implement
- Systems in place already

# Outgoing Executive Board Transition Discussion Topics

## History, Mission, and Goals

- What is the history of your organization?
- What is the mission/vision statement of your organization?
- What were the goals and objectives for the past year? Which were met? Which were not? Why?

## Organizational Structure

- How is the organization structured (*i.e. executive board, committees, general membership, etc.*)?
- Review the job descriptions for each of the members in your group (*executive board members, committee chairs, etc.*). Does the job description accurately reflect what that person is responsible for? Should things be added or deleted from their job description?
- Were there any changes in the structure of the group (*i.e. were new positions added for the coming year, were any positions eliminated, were new committees formed, etc.*)? Why were these changes necessary?

## Advising

- Who is your organization's advisor? What is his/her contact information? What department do they work in on campus? Where is their office?
- Was the advisor involved just enough, too much, or too little?
- Please offer suggestions on the best time to communicate with the advisor, how much he/she likes to know about what is going on with the organization, etc.
- What expectations did you and the advisor agree upon at the beginning of the year, if any? Were they adhered to by both parties? What suggestions would you offer for next year?

## Events & Logistics

- What are your organizations main events/projects throughout the year?
- For each event/project you discussed/listed above, please discuss when the event is normally held (date), and make recommendations for next year so the events/projects can be set as early as possible and included on calendar materials
- For each event/project listed above, please discuss the significance (*i.e. purpose, and goals*) of each event/project, what was successful about each event/project (*i.e. was it effective*), what suggestions you would offer for each event/project for next year, and what things need to be done early for each event.
- Which activities should be continued and which should be dropped?
- Was there a good balance of different kinds of events/programs? Is there anything you would do more or less of?
- What university policies and procedures are important for the new leadership to be aware of when planning the above events?
- What ideas /events/ projects did your group hope to implement but did not (and why?)

## Money & Budgeting

- Review last year's budget and your Student Senate request for next year's budget
- How much is spent on each event/project, on food, on supplies, etc?

- Did your organization ask for any reserve request funding from Student Senate this past year? If so, for what and did the Appropriations Committee give you the money?
- What are other major sources of income for your organization (*i.e. fundraising activities, sponsorship, donors, etc.*)? Please be sure to include a list of fundraising events completed and how much money was raised at each, a list of major donors and their contact information, as well as the names and contact information for major sponsors of your organization and what they normally supply.
- How involved is the organizations advisor in the budgeting process?

### **Important Information**

- Where can the organization's old records be found (*i.e. job descriptions, old agendas, invitations, flyers, correspondence, calendars, timelines, etc.*)? Review these items with the new president/chairperson.
- What does the organization have in SOC storage?
- How often did the organization have meetings? What time? When? Where? Did this work? Who comes?
- Does the organization have an email address? What is it? How is it accessed and what is the password to check messages?
- Does the organization have a listserv? How do you access it and what is the password?
- Does the organization have a website? What is the web address? Is it through the university? Who updates it?
- What mailing address does the organization use?
- Does the organization have a letterhead? Where can it be found?

### **Connections**

- Did the organization make any good contacts this year or in past years? Who are they and why were they helpful? What is their contact information? (This list should include things like local non-profit organizations your organization works with, caterers, t-shirt folks, supportive faculty/staff, etc.)
- Does your organization have any national affiliations that can serve as a resource? Who and for what (*i.e. Kiwanis, Best Buddies, Lions, etc.*) Do you pay dues or membership fees? Are there any national conferences they can, could or should attend?
- How can you (*the immediate past president/chairperson*) be reached over the summer and coming year if necessary (email address, phone number, etc.)?

### **Your Parting Thoughts**

- Currently, what are the major strengths of your organization?
- What areas need to be strengthened?
- What was this year's biggest success and why?
- What was the biggest lesson learned this year and why?
- What ideas/suggestions do you have for the new president/chairperson?
- What are the traditions of your organization?
- If I knew then what I know now... (What did you wish someone had told you a year ago?)

# Outgoing Executive Board Transition Worksheet

Please think through and respond to the following questions regarding your responsibilities. This information will be helpful to your successor. These questions should be considered carefully and communicated to the newly elected officer.

1. What I liked best about my position...
2. What I liked least about my position...
3. The most difficult decision I made was...
4. What I could have done to make the experience better was...
5. Obstacles to performing my duties effectively were...
6. Aids which assisted me in handling my job were...
7. Things I wish I'd known before I took office were...
8. What do you perceive to be your organizations objectives or goals?
9. What do you consider to be the responsibility of your position?
10. What do you wish you had done, but did not?
11. What did you try that did not work? Why did it not work?
12. What problems or areas will require attention within the next year?
13. Who was the most helpful in getting things done? (Who were good resources?)
14. What should be done immediately in the next semester?

## Toughest Challenges

**My Top 3 Challenges as a Leader were:**

<b>Category</b>	<b>Description</b>	<b>What's NEXT??</b>
Personal		
Group/Organization		
Campus-Based		

**(EXAMPLE ORGANIZATION)**

**EXECUTIVE BOARD CONTRACT**

I, \_\_\_\_\_ accept the position as \_\_\_\_\_  
*Full Name* *E-board Position*

on the 2009-2010 (*Example Organization*) Executive Board. I fully accept all responsibilities of the position as listed in the position description and as delegated to me by the Executive Director, Assistant Directors, and Advisors. I will adhere to the regulations set forth by the Office of Student Life, Student Senate, and Service and Advocacy Council of Grand Valley State University. I understand that all organization meetings and events are mandatory, unless otherwise stated. I will do my best to represent (*Example Organization*) on campus and in the community and be an active, engaged member of the executive board. If I fail to perform my responsibilities or to meet the expectations presented to me, I understand that action will be taken and I can be removed from the (*Example Organization*) general assembly.

\_\_\_\_\_  
*Chair Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Advisor Signature*

\_\_\_\_\_  
*Date*

# Incoming Executive 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:

Please think through and respond to the following 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 want answered...

## Self Check Ruler

I met with my predecessor and was able to ask questions of them prior to taking over their leadership position.  Yes  No

I was provided with all the contact information of organization members and other affiliates prior to my transition into my current leadership position.  Yes  No

I was introduced to key members of the faculty, administration and community prior to my transition into my current leadership position.  Yes  No

I was adequately informed of the key duties in my position prior to my transition into my current leadership position.  Yes  No

I feel I was well prepared for my transition into my current leadership position.  Yes  No

I had a thorough knowledge of all events previously put on by my organization and was fully prepared to work with the new Executive Board to make them successful during my term.  Yes  No

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Notes

**Goal Sheet**

Academic Year:

Fall ' \_\_\_\_\_ to Winter ' \_\_\_\_\_

**Year-long goals:**


**Fall Term Goals:**


**Winter Term Goals:**


## Projected needs

Use this space to help project your budget needs for the coming year. Start by looking at your past budgets and programs; write down any annual or reoccurring programs and expenses. Look at how much money you needed and spent on other programs. What are your programming goals this year? Will you need more or less money than last year? Did you do any outside fundraising? Will you be doing any this year? Get your projected needs by adding your costs together, and subtracting your fundraising expectations.

### Annual Programs/Expenses

Needs

_____	+ _____
_____	+ _____
_____	+ _____
_____	+ _____
<b>Total needs for annual programs/expenses</b>	<b>\$ _____</b>

### Other Programs/Expenses

Needs

_____	_____
_____	_____
_____	_____
_____	_____
Adjustment for next year's programming goals	+/- \$ _____
<b>Total needs for other programs/expenses</b>	<b>\$ _____</b>

### Fundraising

Previous fundraising total _____	\$ _____
Adjustment for next year's fundraising expectations _____	+/- _____
<b>Total funds expected from outside fundraising</b>	<b>\$ _____</b>

### Projected Needs

Add needs for annual and other programs/expenses _____	\$ _____
Subtract funds expected from S&A Council Fund _____	-\$ _____
<b>Total projected S&amp;A Council Fund needs</b>	<b>\$ _____</b>

**Remember: This is NOT the form to submit for S&A Council funds!!**

# **Names & Phone Numbers To Remember:**

Use this sheet to record names & numbers you use frequently

## **Group Advisor**

_____	_____	_____
(Name)	(Phone #)	(E-mail Address)

## **Other Names & Numbers**

_____	_____	_____
(Name)	(Phone #)	Relation to Org

_____	_____	_____
(Name)	(Phone #)	Relation to Org

_____	_____	_____
(Name)	(Phone #)	Relation to Org

_____	_____	_____
(Name)	(Phone #)	Relation to Org

_____	_____	_____
(Name)	(Phone #)	Relation to Org

_____	_____	_____
(Name)	(Phone #)	Relation to Org

_____	_____	_____
(Name)	(Phone #)	Relation to Org

# Important Information

## Event Services

- Event Services (Kirkhof Center, Cook DeWitt, Henry Hall, Outside Area Reservations)
  - Phone Number 616-331-2350

## Reservation Space and Capacity

- Cook-DeWitt Center
  - Auditorium seats 236
  - Conference Room seats 10
  - Lounge seats 20
  - Patio
- Henry Hall Atrium
- Kirkhof Center:
  - Several Meeting rooms able to fit any size
  - Area 51
  - Thornapple
  - Lobby (four tables able to set up)
  - Pere Marquette seat up to 225 lecture style
  - 2215/2216 seats up to 80 lecture style
  - Grand River Room up to six sections able to seat between 15 and 30
  - Grand River Room ALL seat up to 500 lecture style is available for banquets and seminars
  - SOC- Student Organization mailboxes, computers, etc...
- Outside Event Areas
  - Academic Mall
  - CDC Plaza
  - West Lawn
  - Robinson Field (volleyball courts, grill, cook out stuff)
  - VanSteeland Arboretum

## Important Campus Phone Numbers and E-mail Addresses

- UPO 616-331-2340 ([www.gvsu.edu/studentlife](http://www.gvsu.edu/studentlife))
- Academic Building Reservations 616-331-3327
- Alumni House 616-331-3590
- Catering 616-331-3342 ([catering@gvsu.edu](mailto:catering@gvsu.edu))
- Custodial 616-331-3149
- Downtown Event Services 616-331-6620
- Facilities ([servicef@gvsu.edu](mailto:servicef@gvsu.edu)) 616-331-3000
- Fieldhouse 616-331-3313
- Public Safety 616-331-3255
- Residence Hall Reservations 616-331-2120
- SOC 616-331-2360 ([www.gvsu.edu/studentlife/soc](http://www.gvsu.edu/studentlife/soc))

## Recruitment Tools and Techniques

<b>Methodology</b>		<b>Documentation</b>		<b>What's NEXT?</b>
<b>Recruitment Method</b>	<b>Description</b>	<b>Paperwork/ Fliers</b>	<b>Included?</b>	<b>Key contacts for success</b>