***An intentional process for a seamless transfer of organization responsibilities that builds emerging leaders, prepares incoming leaders, recognizes the work of outgoing leaders, and positions the organization for long-term success***

Good transitions involve both **logistical tasks** and **relationship building**. When done well, this process is ongoing

**T**alk to each other

* Make sure that you are meeting with your successors – multiple times if possible
* Connect incoming and outgoing exec board members
* Group conversations and group goal setting sessions are great!
* Engage your advisor in these conversations if possible

**H**ave a plan for transitions at the beginning of your term

* Transitions should be a part of your calendar from the beginning
* Plan for shadowing time
* Are you in the right registration window for your transition timeline?

**R**ecords matter

* Be thorough with your transition records
* Keep them digital so people can build year to year (does anyone really read that binder?)
* Write them as you go – do your future-self a favor
* Follow the transition document check list

**I**nitiate relationships for your successor

* Connect your successor to key people they may need to know (i.e., advisor, university staff, orgs you collaborate with frequently)
* Start a conversation they may not know they need to begin

**V**isit the bank (and other logistics)

* Go to the bank and transition the account
* Prepare for org registration process
* Prepare them to budget/calendar plan for the year
* Follow the transition check list

**E**nsure your organizations lasts beyond you

* *This is the ultimate goal of leadership transitions*

**go.osu.edu/SuccessFramework**

* Don’t make your successors start from scratch – let them build on your work so that your organization will not only survive, but thrive

**Transition Document Check List**

* Up to date copy of organization’s constitution and bylaws
* Up to date position description
* Letter from outgoing officer with thoughts and reflections about the past year in the position (what went well, what could have been better, what is ongoing what did you want to try but didn’t, etc.)
* Important contact list, including their name, email, and phone number of possible (advisor, university support staff, organizations you collaborate with, etc.)
* Organization financial information (if applicable to the position)
* Sample meeting minutes
* Sample calendar for the year
* Major events and their planning timelines
* Information about relevant Ohio State resources (Student Org Success Framework, Student Org Success Coaches, Programming and Operating Funds requests, meeting space reservations, etc.)

**Transition Check List**

* Complete/update transition records
* Schedule meeting(s) with outgoing and incoming officer
* Schedule meeting(s) with outgoing and incoming executive board
* Schedule meeting(s) with organization advisor
* Plan for an opportunity for incoming leaders to shadow outgoing leaders
* Update roster in Student Organization Management System
* Update information with bank account
* Update access for any website, email, listserv, etc.
* Plan the budget and calendar for the upcoming year (this could best be done with the combined incoming and outgoing executive board)
* Share access to Buckeye Box, One Drive, Google Drive, etc. that your organization uses

Want to think through your organization transition more in detail and find out other university resources who can help you succeed? Reach out to the **Student Organization Success Coaches** at [**go.osu.edu/sosco**](file:///C:\Users\fredendall.7\Desktop\go.osu.edu\sosco)