

W&M STUDENT LEADERSHIP DEVELOPMENT

Officer Transition Guide

This Officer Transition Guide is designed to assist organizations in conducting a thorough, effective, and efficient transition process from one leadership team to the next. Organization's may have more comprehensive or complex transition processes in place, this can be used to complement or enhance existing practices. If you have any questions or need assistance with your transition process, reach out to Student Leadership Development at leadership@wm.edu.

Updating TribeLink

The first important step to a successful transition is to make sure your organization's TribeLink page is updated. In general, you will want to make sure the appropriate officers become familiar with the various TribeLink features that will help them fulfill their responsibilities, but before they can do that the following information must be updated:

- ◇ Incoming Officers have been [assigned the correct positions](#) (and outgoing officers have been un-assigned the positions); this will ensure the correct officers are receiving communication from SLD and have access to relevant TribeLink features
 - ◇ Key officers to make sure are updated: Financial Manager, Scheduling Contact, and Secondary Contact (please list no more than 2 secondary contacts, and the primary contact should not also be listed as a secondary contact)
- ◇ [Review and update the membership roster](#) as needed
- ◇ [Update the Primary Contact](#) - this individual will become an all-access manager of the organization's TribeLink page AND the owner of the organization's Microsoft O365 account (if applicable).

[TribeLink How-To Guides](#) are available on the Student Leadership Development website and should be shared with all applicable officers. The TribeLink features other organization leaders may need to become familiar with are Events, Finance, Documents, Forms, etc.

Accounts and Passwords

Passing along the account and password information for various online accounts and services is very important, and often overlooked. Think about ALL the platforms and services where the organization has an account and make sure to share that information (website, username, and passwords) with the next officers. Here's a list of some common accounts that your organization might have to get you started:

- ◇ Instagram
- ◇ Snapchat
- ◇ Tik Tok
- ◇ Email (if not using W&M's O365)
- ◇ Online banking services
- ◇ Subscription services like Canva

Working with Advisors

While organizations are not required to have advisors (faculty/staff), many find that having an advisor can be beneficial to the organization as these individuals can provide coaching, perspective, and connections to resources. If your organization has an advisor, here are some things to do:

- ◇ facilitate a connection between the advisor and the new officers; this can be as simple/quick as sending an introductory email or you can arrange and participate in an introductory meeting.
- ◇ Make sure the new officers have current contact information for the advisor and understand their role in supporting the organization
- ◇ Share some tips on how to effectively communicate/engage with the advisor, i.e. frequency of meetings, preferred communication styles, etc.

Financial Information

Organization Budget Allocation from Student Assembly

- ◇ Review the current budget allocation from the [Organization Budget Allocation Process](#) (if applicable)
- ◇ Explain the Organization Budget Allocation Process [guidelines and procedures](#) to ensure that the incoming officers know and understand:
 - ◇ How to request future funding and submit [purchase requests](#) for current allocations
 - ◇ How to [promote events](#) and [track attendance](#) at events in TribeLink
 - ◇ How to submit after-action reports (download any old after action report submission and [save them in the organization's TribeLink documents](#) for future reference)
- ◇ Encourage new officers to attend information sessions hosted by Student Assembly to learn more

Off-Campus Banking Information

If your organization has an off-campus bank account, make sure you pass along critical account information AND update the signatories on the account.

Critical Account Information:

- ◇ Name of banking institution
- ◇ Address/Phone Number
- ◇ Tax ID/EIN for the organization
- ◇ Account number
- ◇ Online banking log-in information

Updating Signatories

Check with the bank to make sure you have all the necessary information/paperwork to update signers on the account. Each bank may have different requirements, so reach out and ask what they need from you and what the process looks like. Set a time that all individuals being removed AND added as signatories can go to the bank together to complete this task.

Important Conversations and Information to Share

Operational Topics - These are typically going to be the “nuts and bolts” or “how-to” conversations, accompanied by binders, documents, etc.

- ◇ Meetings - How to run them, creating agendas, scheduling of meetings, etc.
- ◇ Reviewing position responsibilities and timelines
- ◇ Review organization governing documents and operational manuals/guides
- ◇ Discuss expectations and accountability procedures, as well as decision making practices for the organization
- ◇ Share information on important offices to become familiar with and why those offices are helpful to the organization

Strategic Topics - These are the broader, more philosophical and reflective, conversations.

- ◇ What goals did the outgoing leadership team set at the beginning of the term? Were these goals met? What contributed to the meeting/not meeting of the goals?
- ◇ What programs/events/projects/initiatives were effective and what is the outgoing leadership team most proud of?
- ◇ Which were not, and what could have been done differently?
- ◇ If the outgoing leadership team had 3 more months in office, what would they do with that time?
- ◇ What lessons learned can the outgoing leadership team share with the incoming team?

Miscellaneous Tasks

- ◇ Recognize and thank outgoing officers for their contributions to the organization.
- ◇ Offer encouragement and appreciation to new officers for stepping up into leadership roles
- ◇ [Send important and/or interesting documents to University Archives](#)
- ◇ Take inventory of physical equipment/materials, and ensure new leadership has possession of or access to these items (examples include: tablecloths, tabling materials, banners/signs, equipment, promotional items, uniforms/costumes, event decorations, etc.)