**Transition Report**

***Title of Position***

Name of Registered Student Organization

1. **WELCOME / INTRODUCTION**

* *Welcome new officer to the specific position*
* *Briefly discuss importance of the position, time commitment, etc.*

1. **SUMMER/WINTER BREAK RESPONSIBILITIES**

* *Work that can be done over the summer/winter break (depending on when your RSO transitions leadership) in order to prepare for the upcoming semester*

1. **WEEK-TO-WEEK**

* *Description of weekly responsibilities and commitments*
* *Brief overview of what is done on a weekly basis to fulfill position requirements*
* *How many hours per week do you invest in the RSO?*

1. **CALENDAR**

* *Month by month guide for the year*
* *Include “typical” calendar tasks and responsibilities that occur during each month*
* *Include any specific dates associated with this responsibility*
* *Include specific dates that are relevant to anyone in the organization (e.g. annual events, elections, regular meetings, etc.)*

|  |  |
| --- | --- |
| **MONTH** | **RESPONSIBILITIES** |
| April | * Attend an RSO Transition Workshop * Student Organization Re-Registration |
| May | * Register for the Week of Welcome SOAR Fair(s) |
| June |  |
| July |  |
| August |  |
| September | * Attend the RSO Conference |
| October | * Organize a team to compete in the Homecoming student competitions |
| November |  |
| December | * Register for the Welcome Back Week SOAR Fair(s) |
| January | * Attend the Leadership Conference |
| February |  |
| March | * Apply for SABAC Annual Budget funds |

1. **MAJOR RESPONSIBILITIES**

* *Provide all necessary information regarding each major responsibility. Feel free to provide the information in a bullet list form. Provide all items that you feel are necessary, but specifically address the subcategories below (if applicable) for each major responsibility.*
  + **Mission/Purpose of Responsibility**
    1. *Purpose statement and/or overall description for the major responsibility*
  + **Background**
    1. *Any historical or background information associated with the major responsibility*
  + **Responsibilities**
    1. *Tasks/duties associated with the major responsibility, formal position description/expectations*
    2. *Any specific information or details about the major responsibility that would be helpful to know*
    3. *Include information on obtaining funding, if necessary*
  + **Meetings**
    1. *List of meeting days and times of regular exec, general, or other meetings associated with the responsibility, i.e. University Council, Cabinet, one-on-ones, planning meetings, etc.*
    2. *Provide any anecdotes or informational items regarding each meeting (if applicable) – who to contact, will you be leading, etc.*
  + **Structure**
    1. *Provide the structure/organization of the responsibility (include any history of the structure if it has changed over the years) and advice on what works best/challenges you’ve seen, etc.*
  + **Areas of Improvement**
    1. *Any issues associated with the major responsibility and how to avoid them*
    2. *How can this responsibility be improved in the future?*
  + **Words of Wisdom**
    1. *Any words of advice for the new person around the major responsibility*

1. **IMPORTANT CONTACTS**

* *Important people/contacts that help you carry out your responsibilities*
* *For each contact, include name, title, email, phone number, location, relationship to major responsibilities, and why this contact is important*
* *Provide contact information for students, staff, outside entities, etc. with whom you have consistent or occasional contact*

1. **Account Information**
   * Bank Account
     1. Vendor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
     2. PIN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Facebook Page: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Instagram Account
     1. Username: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
     2. Password: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Snapchat Account
     1. Username: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
     2. Password: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. **Transition Checklist**

Documents to maintain and pass down:

\_\_ Constitution and bylaws

\_\_ Roster with KSU ID#’s, KSU emails, and contact information of members

\_\_ Advisor contact information

\_\_ National organization documents (if applicable)

\_\_ Past meeting minutes

\_\_ Bank account and finance info (receipts, bank statements, etc.)

\_\_ Contact sheet for previous officers

\_\_ Contact sheet for important offices, businesses, etc.

\_\_ Formal communication documents (from KSU, National Organization, etc.)

\_\_ How To’s for any organization processes

\_\_ First 30, 60, 90 day guide for new officers

\_\_ Other:

\_\_ Other:

Action items for transition:

\_\_ Update your roster in Owl Life

\_\_ Complete officer training in Owl Life

\_\_ Transfer documents to new officers

\_\_ Provide training to all new officers

\_\_ Notify your advisor of changes in leadership

\_\_ Notify Student Life of the changes with the Re-registration form or Office Update form

\_\_ Introduce new officers to Student Life staff and other KSU administrators

\_\_ Update your national organization (if applicable)

\_\_ Transfer ownership of social media accounts

\_\_ Change names on bank account

\_\_ Transfer ownership of email or other online accounts

\_\_ Transfer ownership of any physical resources or equipment

\_\_ Check in with officers two weeks after transition

\_\_ Other:

\_\_ Other: