OFFICER TRANSITION BINDER

CORNELL UNIVERSITY
Campus Activities

Introduction:

Transition documents are helpful as they enable a smooth transition between officers and allow organizational information to be passed from student leader to student leader. As part of the funding track requirements, it is recommended that Track 1 & 2 have a transition document. For funding tracks 3 & 4, a transition document is required.

The below document is a *TEMPLATE* and can serve as a guide for organizations that do not have a transition document.

Required Elements:

☐ **Account information**: including Website(s) login information *(if applicable)*, Social media login(s) *(if applicable*), and the email address login.

☐ **Key Contacts**: In this section, you should list the organization's critical contacts across campus.

Recommended Elements:

☐ **Transition Meetings**: In this section, list the transition meetings and any outcomes/essential takeaways from those meetings, including the location of any meeting notes. *(Recommended meetings and topics are provided later in this document.)*

☐ **New Officer Advice**: List any advice outgoing officers have for the new officers to ensure their success in taking over the role. *(Example questions are provided later in this document.)*

☐ **Annual Timeline**: Please include the timeline of the organization's annually occurring activities or events, such as elections, repeat events, and important deadlines. *(Clubfest, re-registration, Leadership Workshop Series, Funding Track Requirements, and Signature Event Planning are all required subsections.)*

Next Steps:

☐ **Centralize Documentation:** Use the file upload feature in CampusGroups or a Google folder connected to the primary group email to centralize all documentation the organization has in one place for the incoming officers requirements and recommendations are provided at the end of this document. *(please include the passwords to access this for future officers in your transition document's required account information section.)*

☐ **Update Officers in CampusGroups**: If the organization timeline allows, officers can be changed during the re-registration process *(group officers changing July-October)*. If officer updates are needed outside the registration process, they need to email CampusGroups@cornell.edu the following information:

- ☐ Names of currently listed officers who should be removed
- ☐ Names of currently listed officers who should remain the same
- ☐ Names and NEW positions of currently listed officers who have had a change in positions
- ☐ Names, NetIDs, and positions of Officers who need to be added

Please note that a President, Vice-President, Treasurer, and full-time faculty/staff Advisor is required.

REQUIRED ELEMENTS

What is Required?

Account Info: In this section, you should include the process to access secure passwords and account information for the organization's website, social media accounts, and the required centralized email address.

- ☐ Website(s) login: *(Insert website location and log in here)*
- ☐ Social Media login(s): (Insert social media and logins here, ex, Instagram, LinkedIn, Meta, X, etc.)
- ☐ Email login: *(Insert email login here)*
- ☐ Big Reg Guidebook: A resource for tips and support for your student organization.
- ☐ Accessing Centralized Documentation: Please list the location of your group's centralized documents here. We recommend using CampusGroups to store these documents, but if you are not doing so, please share any passwords for accessing this here.

Key Contacts: In this section, you should list the organization's critical contacts across campus. All of the contact information below is required if applicable to your organization.

- ☐ Advisor Contact: the best way to communicate with your advisor and their preferred contact method
- ☐ Primary Funding Board email: List your Primary funding board here *(if you need clarification on who your primary funding board is, please review your accounting book in CampusGroups for the allocation source)*. The primary funding board contacts are safc@cornell.edu, interfaith@cornell.edu, clubsports@cornell.edu, gpsafc@cornell.edu
- ☐ Supplementary Funding information: List any supplementary funding sources the organization has used previously or would like to pursue, such as CU Tonight or Haven *(Funding Guidelines & Opportunities)* if applicable
- ☐ Campus Activities: activities@cornell.edu
- ☐ Working with Minors: youthprogramadministrator@cornell.edu if the organization is working with minors
- ☐ Student Organization Business Office Help Desk Ticket: https://cglink.me/2ee/s94782 *(For payment requests and accounting questions)*
- ☐ CampusGroups: campusgroups@cornell.edu *(For CampusGroups support)*
- ☐ Departments: complete this section only if your organization is connected with a department
- ☐ Off-campus organizations: List approved documented affiliations with off-campus organizations if applicable
- ☐ Other student organizations: List any student organizations that the group regularly works with, if any.

RECOMMENDED ELEMENTS

What is Recommended?

Transition meetings: Transition meetings are not required but highly recommended as they help ensure a smooth transition between officers and advisors. Below are recommendations on what meetings and materials for review would benefit new officers to help ensure the organization's success. In this section, list the meetings and any outcomes/essential takeaways from those meetings, including the location of any meeting notes.

- ☐ Set-up meetings between outgoing and incoming officers for each role.
    - ☐ Go over transition documents now and ensure all updates have been made.
    - ☐ Discuss Club Goals, expectations, current operations, Campus Activities expectations *(re-registration process, updated constitution)*, and University expectations *(university policy compliance, ex, branding, waiver requirements, etc.)*
    - ☐ Review the constitution for accuracy at this time
- ☐ Set-up meeting between incoming officers and advisor.
    - ☐ Request the Advisor bring the advisor checklist.
- ☐ Set-up meeting between all officers for the upcoming semester.
    - ☐ Complete updates on the Constitution and determine who will be responsible for initiating the re-registration process.

Advice for All New Officers: This section is optional but highly recommended to ensure success. We understand many groups have more than a President, Vice-President, and Treasurer and highly recommend each incoming role receive advice from current leadership.

- ☐ **President**
    - ☐ What made you successful in this role?
    - ☐ What do you wish you knew or prepared more for coming into this role?
    - ☐ What are some of the more nuanced responsibilities of the role new officers should be aware of?
    - ☐ Are there any major takeaways you want to share from a Leadership Workshop Series session or any recommended sessions?

- ☐ **Vice-president**
    - ☐ What made you successful in this role?
    - ☐ What do you wish you knew or prepared more for coming into this role?
    - ☐ What are some of the more nuanced responsibilities of the role new officers should be aware of?
    - ☐ Are there any major takeaways you want to share from a Leadership Workshop Series session or any recommended sessions?

- ☐ **Treasurer**

- [ ] What made you successful in this role?
- [ ] What do you wish you knew or prepared more for coming into this role?
- [ ] What are some of the more nuanced responsibilities of the role new officers should be aware of?
- [ ] Are there any major takeaways you want to share from a Leadership Workshop Series session or any recommended sessions?
- [ ] **Other**
  - [ ] What made you successful in this role?
  - [ ] What do you wish you knew or prepared more for coming into this role?
  - [ ] What are some of the more nuanced responsibilities of the role new officers should be aware of?
  - [ ] Are there any major takeaways you want to share from a Leadership Workshop Series session or any recommended sessions?

Annual Timeline: It is recommended to include the timeline of the organization's annually occurring activities or events, such as elections, repeat events, and important deadlines.

- [ ] [Club re-registration](): Mid Summer-Mid Fall semester
- [ ] [ClubFest registration](): Early fall semester after re-registration has been approved by CA and again in the Spring semester *(organization must be fully compliant with university policies)*
- [ ] [Leadership Workshop Series](): The leadership workshop series is in-person and virtual training on various topics for students and advisors. The series is designed to provide educational resources and development to student organizations wishing to develop their success on campus further. The series will be offered each semester with a set calendar of workshops scheduled throughout the semester.
- [ ] [Funding Track Requirements](): To be considered for funding, your organization must meet the requirements during the current academic year. The track requirements must be maintained and completed yearly for evaluation by the primary funding boards (SAFC, GPSAFC, ICC, CSC) and Campus Activities.
- [ ] Signature event planning: In this subsection, you should include the location of files that pertain to any signature events the organization puts on, along with any information needed for new officers to successfully continue this signature event, including but not limited to the budget, room reservation details, promotion timeline, and FAQs.
- [ ] [Reserving rooms]()
- [ ] [Payment requests]()
- [ ] Undergraduate organizations are "officially" registered from when their re-registration is approved until the last day of classes *(throughout the academic year and must primarily host club operations, events, and activities when classes are in session).* Graduate/Professional organizations are "officially" registered from when their re-registration is approved throughout the calendar year. Events, activities, and operations should pause during finals *(not study days)* to allow students to focus on academics.

NEXT STEPS

What are the Next Steps?

Centralized Documentation: You are required to share the location of all centralized documents for your group. Below are some recommendations of what these documents may include. The items below will help ensure a smooth transition between executive boards so that information is kept and available to new leaders.

- ☐ A copy of the constitution, by-laws, policies, and procedures (this is also required in the submission of re-registration; ensure the constitution contains the most up-to-date information by following the template.
- ☐ Officer Job Descriptions – as outlined in by-laws and revised by outgoing officer
- ☐ Goals and objectives from the last year
- ☐ Status reports for ongoing projects and past projects
- ☐ Previous meeting minutes/agendas and officer reports
- ☐ Financial records/budget - relating to officer position/organization
- ☐ Event plans or templates - for any events your club has thrown in the past, especially for signature events associated with your organization (Recommended)
- ☐ Past event promotions - graphics, emails, etc.
- ☐ Room reservation procedures - scheduling@cornell