

# Buffalo State College

## Club Leadership Transition Handbook

Created by the Student Leadership & Engagement Office at SUNY Buffalo State

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## SAMPLE TRANSITION BINDER OUTLINE

Below is a listing of information and documents that are recommended to include while building a transition binder. Depending on your club or organization you will need to adapt the following outline to fit your needs.

### 1. Club Center Contact Information

- a. Student Leadership & Engagement & USG Contact Information
- b. Quick Resources and Referrals
- c. Buffalo State Helpful Websites

### 2. Club History

- a. Mission Statement
- b. When was the club/organization founded?
- c. Important Alumni Information

### 3. Club Contact Information

- a. General club contact information
  - I. Facebook account information & password
  - II. Twitter account information & password
  - III. General club email address & password
- b. Current executive board's contact information
- c. Member & officer contact list
  - I. Signed executive board contracts
- d. Previous executive board's contact information
  - I. Member & officer contact list
- e. Advisor information
  - I. Department, office location, & contact
  - II. Role on campus
  - III. Officer job descriptions
- f. Other organizations / Community Liaisons:
  - I. List of agencies + contact info.
  - II. Funders (List of companies + contact info.)

### 4. Club Constitution

- a. Note of any recent changes
- b. Bylaws if applicable

### 5. Calendar of Events/Annual Events/Signature Events

- a. How to reserve a space
- b. Notes on annual/signature events with:
- c. Timeline of event
  - I. Methods of publicity used
  - II. Important contacts (partnerships and/or sponsorships)
  - III. Location information and contacts
  - IV. Media coverage and contact information
  - V. Budget for event
  - VI. Improvements to be made

## 6. Public Relations

- a. Newsletters
- b. Promotional/recruitment flyers
- c. Copies (hard and/or electronic of past fliers)
- d. Additional public relations materials
  - I. Alternative methods of recruitment used
  - II. Recent Press
  - III. Pictures

## 7. Financial Overview

- a. Current Budget
- b. Finance cheat sheet
- c. Information on grants and other funding

## 8. Bengal Connect

- a. Instructions
- b. Club Registration Applications
- c. End of the Year Reports

## 9. Additional Information

- a. Awards & Recognition
- b. Forms
- c. Templates

## TRANSITION OVERVIEW

*A successful leadership transition process should be carefully planned out. There are four key phases to a transition; Pre-Transition, Preparing for the Transition, Passing the Torch and Thinking Ahead for the fall. The bulk of the transition will occur in the spring semester but it's important to carry out the transition through the summer to be fully prepared for the fall semester.*

### Phase 1: Pre- Transition

The following should have already been accomplished:

- Elect your new Executive Board- make sure to hold elections early enough to leave yourself enough time for a successful transition (4-6 weeks at least).
- Finish all necessary correspondence (paperwork, letters, emails, phone calls)
- Submit your budget request to your funding source (USG/Student Leadership & Engagement/Grants respectively)
- Develop action plan and timeline for new officer transition

### Phase 2: Preparing for the Transition

Complete the following:

- Executive Board Contact information for new academic year (including name, Buffalo State email, preferred email, and Banner number) sent to the Student Leadership & Engagement Office.
- Introduce all new E-Board members to advisors

Preparing information for the incoming E-Board:

- Invite the incoming executive board members to attend a meeting led by the exiting executive members- this will help new E-Board members to understand the roles and responsibilities of their respective leadership positions.
- Organize files (paper & electronic) to ensure proper documentation
  - Create transition binders. 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 "job" description
    - Key Administration Contacts
    - Exit Interview
    - End of the year report & evaluation

### Phase 3: *Passing the Torch*

Schedule Transition Meetings:

- Ideally, the outgoing President/Vice President should meet one-on-one with the incoming President/Vice President and include the advisor during the spring semester.
  - Topics of discussion:
    - Calendar
    - Goals for next year
    - Past, current, and future issues
    - Financial status of club/organization
    - Expectations of roles
- Hold a joint meeting for the outgoing and incoming executive board. Think of this as an adjustment period.
  - Suggestions for agenda:
    - Introductions
    - Review of constitution
    - Review the goals and accomplishments of current year
    - 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 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.

- Outcomes of holding a retreat:
  - Increase and foster open and honest communication
  - Builds positive social relationships
  - Develop trust and mutual support
  - Builds respect...appreciation of differences
  - Builds pride for your group
  - Use the uniqueness of members to accomplish goals

### Phase 4: *Thinking Ahead for Fall*

Fall can be a busy time of the year! Plan ahead and think of the following items over the summer so that you are fully prepared for your new leadership position.

- Introduce E-Board members to advisors and other key administrators
- Prepare for Homecoming (Homecoming 2017: October 22 -28, 2017)
- Update constitution, job descriptions to make sure that they accurately reflect the organization
- Informal meetings to encourage group bonding and support
- Review rosters on The Link and update as needed
- Update calendar
- Create timelines

**OUTGOING EXECUTIVE BOARD  
TRANSITION DISCUSSION TOPICS**

**Goals:**

What were the goals, and how well did we do on each goal?

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Which goals should be continued?

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Which goals should be altered?

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Which goals should be dropped?

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**Programs and Activities:**

What activities and programs did we sponsor?

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How effective was each program?

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Did we do any community service activities?

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Were the programs and activities consistent with group goals?

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Which activities should be continued and which should be dropped?

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**Membership:**

Do we currently have just enough, too few, or too many members (in light of the group's goals)?

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How effective were our membership recruitment efforts, if any?

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Are the members actively involved in the operation of the club (including decision making, planning, implementing, and evaluating)?

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Are members enthusiastic about the activities and motivated to work towards the group goals?

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**Officers and Organizational Structure:**

Do officers understand their responsibilities and roles within the organizational structure?

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Did the officers operate as a team or could cooperation between officers be improved?

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Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?

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How would the general membership evaluate the effectiveness of the officers?

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How would the officers evaluate the effectiveness of the officers? What could be improved?

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**Organizational Operation:**

Was the budget managed properly?

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Were meetings run effectively?

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Was the frequency of meetings appropriate?

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Do we experience scheduling conflicts with other groups or activities?

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Additional Notes:

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**EXECUTIVE BOARD CONTRACT**

I, \_\_\_\_\_ accept the position as  
\_\_\_\_\_ on the (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 President, Vice President, and Advisors. I will adhere to the regulations set forth by Student Leadership & Engagement and Buffalo State College. 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 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) by the general body.

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Signature

Date

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Advisor

Date

**INCOMING E-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:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

Please think through and respond to the 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 wanted answered...

**MEMBER & OFFICER CONTACT SHEET**

**Organization Information**

Organization Name: \_\_\_\_\_  
Organization E-mail: \_\_\_\_\_  
Organization Web Site: \_\_\_\_\_  
Number of Current Members: \_\_\_\_\_

**Primary Contact Person**

Name: \_\_\_\_\_  
Title/Position: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Email Address: \_\_\_\_\_

**Officers**

If you have additional officers, please attach a list to this form.

Name: _____	Name: _____
Title: _____	Title: _____
Email: _____	Email: _____
Name: _____	Name: _____
Title: _____	Title: _____
Email: _____	Email: _____
Name: _____	Name: _____
Title: _____	Title: _____
Email: _____	Email: _____
Name: _____	Name: _____
Title: _____	Title: _____
Email: _____	Email: _____

**Advisor**

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Campus Address: \_\_\_\_\_  
Phone Number(s): \_\_\_\_\_  
Email Address: \_\_\_\_\_

## HELPFUL BUFFALO STATE WEBSITES

**Student Leadership & Engagement:**

**How to Form a Club/Register Your Org:**

**Student Organization Affiliation Policy:**

**Student Organization Handbook:**

**Reserving Space on Campus**

**Funding Opportunities:**

**Events Calendar:**

**Event Checklist:**

**United Students Government (USG):**

**Greek Life:**