

# STUDENT GROUP SERVICES

## OFFICER TRANSITION PACKAGE TEMPLATE



# Executive Package Template

Student Group transitions can be a difficult or stressful process. To make the process easier, we have created this template for outgoing executives. The purpose of this template is to provide all the necessary information needed to the incoming executive taking over your position and ensure that they have all the tools they need to successfully perform their duties. Feel free to change the title of this document to match your specific position.

NOTE: This is a **TEMPLATE**. The purpose of this document is for you to use as your transition package for an incoming officer/executive. The contents of this document are meant to be edited to match your specific needs.

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## Letter from Outgoing Executive

Hello (incoming officer)

It's been great doing this role...

While I was in this position I was hoping to achieve...

I was able to achieve...

Still need to work on....

Some common challenges you might encounter during your term are...

I'm sure you'll be great at this role because...

Best of luck to you.

Sincerely,

Name

## Roles and Responsibilities

Provide detailed roles and responsibilities for your position along with your specific accomplishments in the position.

### In this role you will be in charge of:

(List the general duties, which could look something like below)

- Event planning
- Advertising/promotion of the group
- Social media

### Your responsibilities will include:

(List specific responsibilities, which could look something like below)

- Completion of GLO: Essentials
- Completion of Event Organizer Training
- Planning battle of the bands
- Planning Halloween social
- Planning Christmas party
- Creating advertising graphics

## Your past accomplishments will include:

(List important program/ event/ task debriefs, which could look something like below)

- Biggest halloween social - successful because of x, had challenges with y, I would approach it differently this year by considering z
- Created templates for instagram - successful because of x, had challenges with y
- Worked with the rest of the officers to secure fundraising opportunities - successful because of x, had challenges with y

## Officer Calendar Template

Could look something like below:

| Date           | Note                                    |
|----------------|---|
| March 24th     | First Event planning starts             |
| May 15th       | First Event happens                     |
| June 30th      | could have a fundraising event          |
| July 15th      | Check if you can sign up for clubs fair |
| August 15th    | Recruitment 101 workshop                |
| September 3rd  | Recruitment begins                      |
| September 30th | Recruitment ends                        |
| October 25th   | (could have a halloween event)          |
| December 5th   | December event                          |
| February 5th   | (could have a valentine event)          |
| March 10th     | Annual general meeting                  |
| March 15th     | Transition meeting                      |

You could either include the important dates from your year, or take the extra time to look at their upcoming year. Be sure to also include any other deadlines that are not events, such as signing important documents, times to start planning, and any larger group events that are relevant to all members.

## Event Descriptions

Timelines, budgets, planning charts, lists, evaluations, and statistics. Outline the reasons why you made certain choices and decisions, what the goals were of the event and whether they were achieved, and make future recommendations based on these. Recording your thought processes lets a new executive avoid pitfalls and make sure they keep what worked well, rather than changing for the sake of change.

### Event 1:

- Started planning on [insert date]
- We had a budget of:
- We held it at:
- Number of attendees:
- When and how we collect the attendees feedback

#### Event Feedback:

Needed more x

Needed less y

Should have spent more time preparing z

I recommend to focus on:

### Event 2:

- Started planning on [insert date]
- We had a budget of:
- We held it at:
- Number of attendees:

#### Event Feedback:

Needed more x

Needed less y

Should have spent more time preparing z

I recommend to focus on:

## Event 3:

- Started planning on [insert date]
- We had a budget of:
- We held it at:
- Number of attendees:

### Event Feedback:

Needed more x

Needed less y

Should have spent more time preparing z

I recommend to focus on:

## Passwords for accounts

Beststudentgroup1 - bank account

Beststudentgroup2 - Instagram

Beststudentgroup3 - Google Drive

Beststudentgroup4- Your Campus Email

(If this package is being made for a president/treasurer, this would be a good section to include all the banking information, including the signing authority transfer letter.)

Campus CCID: Please ensure you switch the Google Drive's ownership to the incoming executive team and ensure they can access all previous resources. You may need to contact IST to renew your group CCID if your group has one. More information can be found [here](#).

Financial: You can request a verification letter from SGS staff via the [Verification Letter Request form](#)! More information about finances can be found in our [financial handbook](#).

## Breakdown of the various committees in the group

- Events committee
- Fundraising committee
- Christmas party committee

Could also include their descriptions. This would help your replacement by having a nice concise list of all the existing committees and their responsibilities.

## Important Contacts:

You could also include a little description of **when** you should contact **who** and for **what**. (Either Emails or Phones)

Advisor contact info - contact right away and introduce yourself. Good source for general student group related advice

External affiliate contact info -contact right away and introduce yourself. Good source for anything that the advisor can't help you with.

Past officer contact info - If you have any questions

SGS contact info - Regarding student group procedure, registration, training or student group perks.

DOS contact info - Regarding events or insurance.

## Resources

And existing templates or copies of important forms/documents. Could be any other resource that doesn't fit anywhere else.

- Meeting agenda template
- Instagram border template
- Important helpful websites
- Where they can buy supplies for things

SGS also has a full list of helpful resources and documents that can be found [here](#).

## Other tips and tricks

- Stay positive
- Work with your team
- Ask for help

## Closing message:

I know you'll do great at this role because..