Student Organization Transitions: Policies & Guidelines

General
- Outgoing Board should be sure to review the organization’s history, constitution, and bylaws with the incoming board.
- Outgoing Board should review officer responsibilities with the incoming Board.
- New Board should attend new organization orientation held in the spring.
- New Board members who want to use the organization’s credit card should attend training in March.
- Provide list of new Board members and introduce members to Associate Dean of Students.
- Outgoing Board should introduce new Board to Faculty Advisor.
- Outgoing Board should turn office keys over (if applicable) to new Board and alert Dean’s Office of the switch.

Annual Report
- Outgoing Board must compile annual report by April 1 and submit to Associate Dean of Students. Report should include:
  - List of all graduating members
  - The organization’s goals for the past year
  - The organization’s accomplishments including events, speakers, symposia
  - An overview of what went well during the year and what could change (including suggestions for changing allocations and/or efforts in the next year)

Digital Storage
- Please create a Box folder to store all of the following documentation. Make sure the appropriate individuals in your organization or student team have access to the folder (with Co-Owner privileges) before you graduate. The Associate Dean of Students should also have access to the folder (with minimum Viewer privileges).
- Make sure the following documents/files are included in your Box folder:
  - Any graphics or logos associated with your organization
  - A master list of all your communications outlets
  - A current membership roster with contact information
  - Contact information on regional and/or national affiliates
  - Meeting agendas and minutes of meetings (if any)
  - Photos
  - Code to storage unit (if applicable)
Communications

- Website and social media accounts should be generic (e.g., studentorganization@richmond.edu), not specific to an individual (e.g., joesmith@richmond.edu).
- New Board should make sure that any website is up-to-date at the start of the school year, and on a monthly basis throughout the year.
- Outgoing Board should provide info on any social media accounts.
- Outgoing Board should provide access to list-servs and membership lists.
- Avoid adopting any technologies that require overly technical skills that may be specific to a unique user. If your organization does use a particular web or blog interface that is not associated with the university, consider creating a user guide with how-to tips that are unique to your organization for your student successors.

Events

- Make sure the following documents are included in your Box folder:
  - Detailed month-by-month and day-of timelines
  - Budget
  - Any print or electronic promotional materials from previous events (postcards, flyers, programs, signage, etc.)
  - Any registrant/mailing lists from previous events
- Outgoing Board should create a procedure manual for any large scale event (symposium, speaker, publicity).
- Information on all vendors used during the year with contact information and service list should be provided to new Board.