



Club Executive Transition Best Practices

A smooth transition is the responsibility of both the outgoing and incoming executives of a campus club. Transitional activities act as a training opportunity for new executives, closure for the outgoing executives, and help the club maintain continuity from year to year.

If your team is currently in the process of transitioning leadership and unsure of where to start, we recommend booking a meeting with the [Campus Clubs Manager](#) who can support your club. The following document outlines some tips and best practices your club can employ during its transition.

Renew your club registration yearly

- Log into Ooks Life to renew your registration and update the club roster.

Update the 'Documents' section of your club's Ooks Life profile

- Incoming executives should have access to up-to-date versions of the following documents. *Please note this entire list might not be relevant to your specific club.
 - Club constitution and bylaws
 - Position descriptions of officers and members
 - List of committees and descriptions
 - Officer and member contact information
 - 3rd party contact information (ie. staff advisor)
 - Basic annual procedures
 - Calendar of annual events and initiatives
 - Mission, philosophy, goals, and purpose of the club
 - Financial records
 - Past and present project evaluations
 - Meeting minutes and agendas
 - Club historical records

Organize a meeting(s) with incoming and outgoing officers

- Outgoing officers should meet with the incoming officers as many times as necessary to communicate important club details, pass on relevant information, and answer questions.
- The following is a list of items you might want to cover during those meetings:



Topic	Actions Items/Questions
Yearly Calendar	<ul style="list-style-type: none"> ● Review the calendar for the past year ● What are the peak times for the club? ● What kind of things should the new executives anticipate?
On-Campus Staff	<ul style="list-style-type: none"> ● Schedule an introduction meeting with the incoming executives and campus resources (ie. staff or administrators) who can act as resources for the new team
Campus Clubs Centre	<ul style="list-style-type: none"> ● Discuss the ways that the club has used the resources in Ooks Life and from the Campus Clubs staff ● Some resources to discuss include: <ul style="list-style-type: none"> ○ Equipment rental ○ Club mailbox and locker ○ Clubs Showcase ○ And more!
Budgets & Financing	<ul style="list-style-type: none"> ● What is the club's financial status? ● How did the club get funded this past year? ● Did the club apply for Grants? What was the result/learnings from the Grant application process? ● Did the club host any fundraisers?
Club Events	<ul style="list-style-type: none"> ● Review past events and discuss future event opportunities ● What activities/events were successful/unsuccessful? Which should be continued/discontinued? ● When should planning start? ● Were there issues during the planning and execution of events? How can those be mitigated next year?
Meetings & Club Organization	<ul style="list-style-type: none"> ● When and where were club meetings held? ● What worked/what didn't work with these meetings? ● How frequently were club meetings held? ● Has a contact list been created for the club?
Next Steps	<ul style="list-style-type: none"> ● Create a list of action items for incoming executives ● Share contact information so that outgoing executives can share resources and support the incoming team



Managing & Transitioning Digital Accounts

Managing a club's digital accounts and social media channels is important for the continued success of campus clubs as they transition yearly. The following guide includes some best practices for handling passwords, email access, social media accounts, and transitioning these responsibilities to new club executives.

Setting Up Accounts

- Email accounts
 - Use a generic club email address (ie. clubname@clubname.com) instead of personal emails
 - Enable two-factor authentication (2FA) for added security
 - Maintain a backup email address(es)
- Social media accounts
 - Use official club names for consistency across platforms
 - Register accounts with the club email, not personal emails
 - Utilize a password manager to store credentials securely

Password Management

- Best practices
 - Use strong and unique passwords for each account
 - Store passwords securely in a password manager
 - Restrict account and password access to club executives only
- Changing passwords
 - Regularly update passwords, especially after leadership changes (yearly transition)
 - Immediately update credentials if a security breach is suspected or occurs

Access and Permissions

- Use role-based access for digital accounts, emails, and social media (ie. President, VP Operations, VP Finance) where appropriate
- Regularly review and remove old admins

Transitioning Accounts to New Executives

- Transition plan



- a. Prepare a digital handover document containing: account credentials (stored securely, not in plain text), platform usage guidelines, and key contacts (ie. advisors)
- Step-by-step process:
 - a. Conduct an orientation meeting with incoming club executives
 - b. Transfer password manager access
 - c. Review and update security settings for digital account(s), email(s), and social media account(s)
 - d. Revoke access to outgoing club executives
 - e. Update contact information in all accounts to reflect the new executives

Security Best Practices

- Use multi-factor authentication (MFA) where possible
- Conduct regular security audits of accounts
- Avoid sharing passwords via email or messaging apps
- Educate club members about phishing and cybersecurity threats

