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Organization Transitioning

Make sure organizations are set up for success during the transition period!

Agenda

1. Welcome
2. Transitioning FAQs
3. Step-by-step
4. Personalization
5. Q&A
6. Close

What is Involve?

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Transitioning FAQs

What is organization transitioning?

1. Organization reregistration
   1. A time for updating your organization!
   2. Org leaders must edit and resubmit for for approval
2. A setting under the Organization "Manage" tab
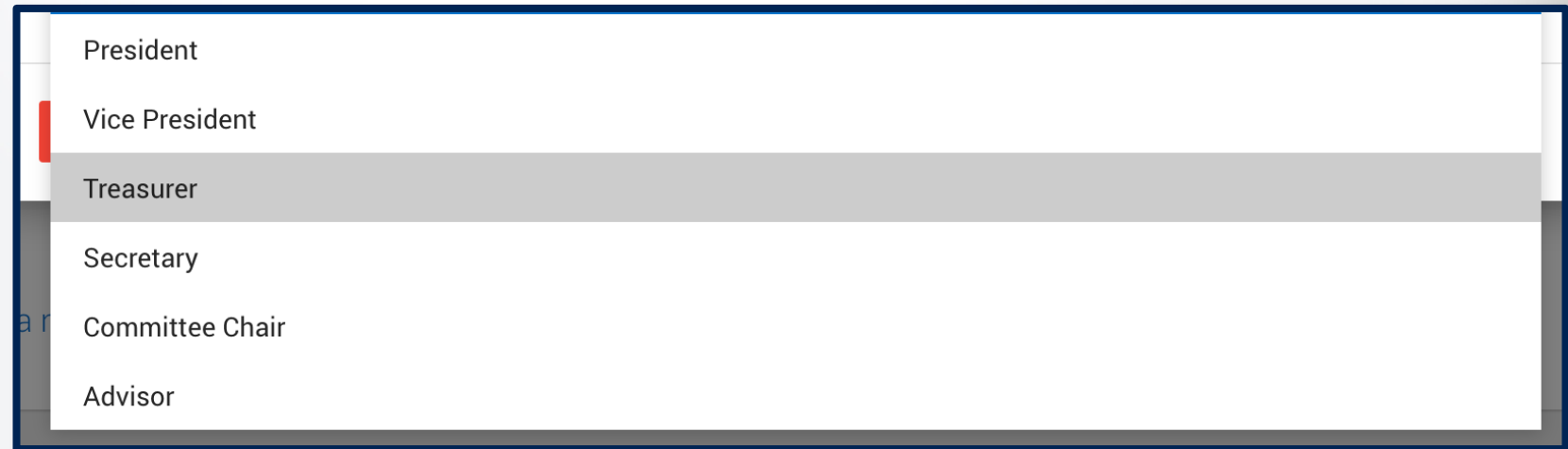
6

Why set up transitioning?

- Lessen your administrative load

- Track the process

- Officers will automatically get privileges
  - Only time that user permissions will auto update
  - No need to go into individual profiles to grant privileges

Updates

Who will get the transition notification / email?

- ALL Leaders
  - President
  - Vice President
  - Secretary
  - Treasurer
  - Committee Chair
  - Advisory
- ALL Advisors

President

Vice President

Treasurer

Secretary

Committee Chair

Advisor

Can I disable transitioning?

- No! Once an organization has been placed in the transitioning process, you cannot reverse the process!

- Reminder: You are NOT required to transition all (or even any) of your organizations

What happens if they don't complete transition?

- They will be unable to add folks to their roster
- They cannot fill out the event registration form
- They will be flagged as

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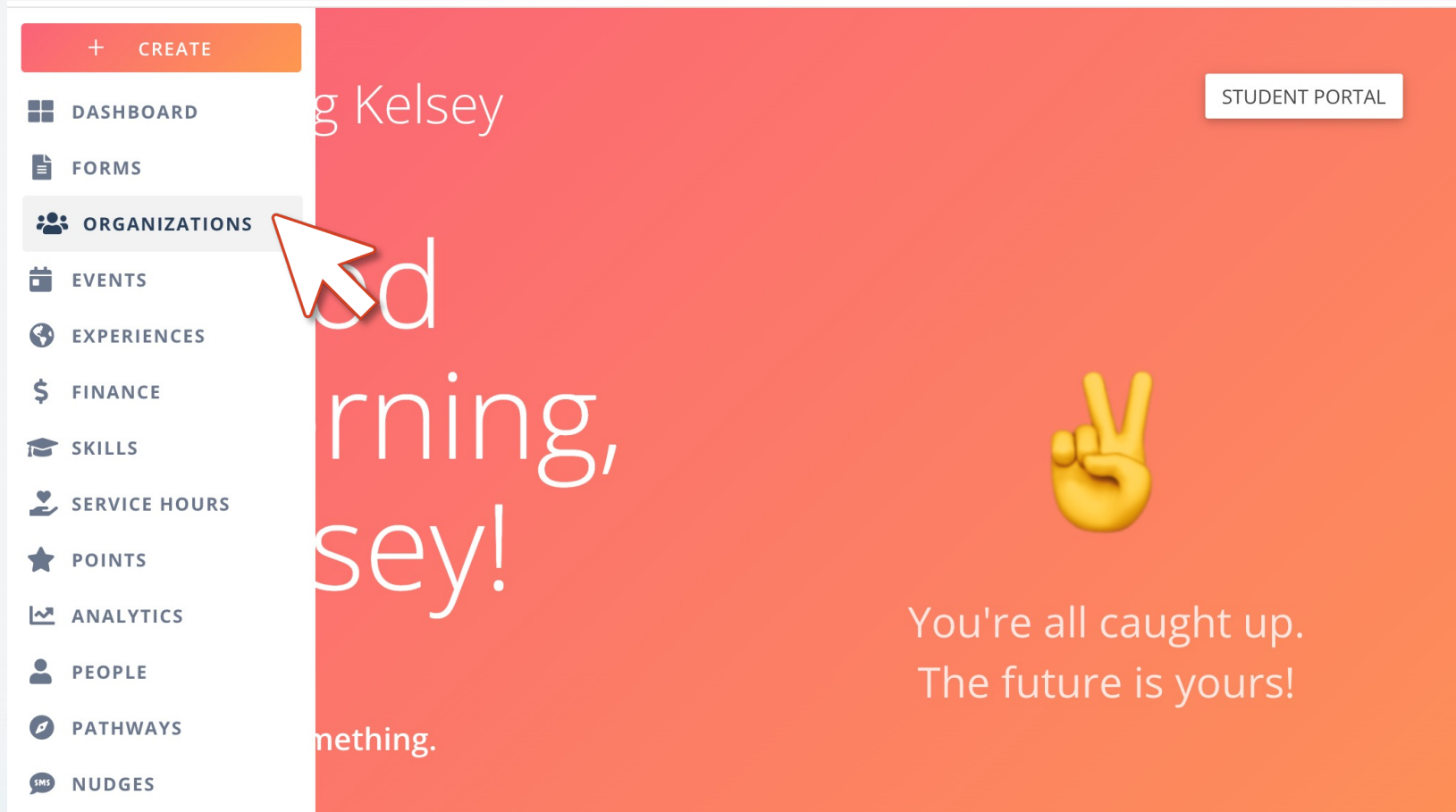Your organization's roster cannot be changed while in transition. ✕

Delta Delta Delta   In Transition   Past Due

The organization leaders won't do it! ☹

- Follow up

- Provide clear messaging

- Provide instructions (we have an article!)

- Provide incentives!

Enable Transitions

(as an administrator)

1. Select "Organizations" from the admin portal

2. Select "manage"

3. Scroll to "Transitioning"
4. Choose "Enable & Setup Transitioning"

5. Hit the check mark
6. Select all organizations you want to complete the process.

Organizations Failing The Transition Required Requirement

NEXT STEP

Select organizations you would like to notify or deactivate. By default, all are selected.

Currently selecting 5 organizations.

Select Organizations

Search Organizations   ✓   TRANSITION STATUS ▾   CATEGORY ▾

✓ Name		Last Notified	Members	Categories	Transition Date
✓ Delta Delta Delta	Past Due	Never	3	Greek Life	8/31/2023, 1:41:33 PM
✓ Roller Derby	Past Due	Never	3	Intramural Sports	8/31/2023, 1:41:33 PM

6. OR select by organization category!

7. Select your deadline
8. Write a custom message
9. Select "Next Step"

8. Confirm your information
9. Select "Enable Transition For Selected"
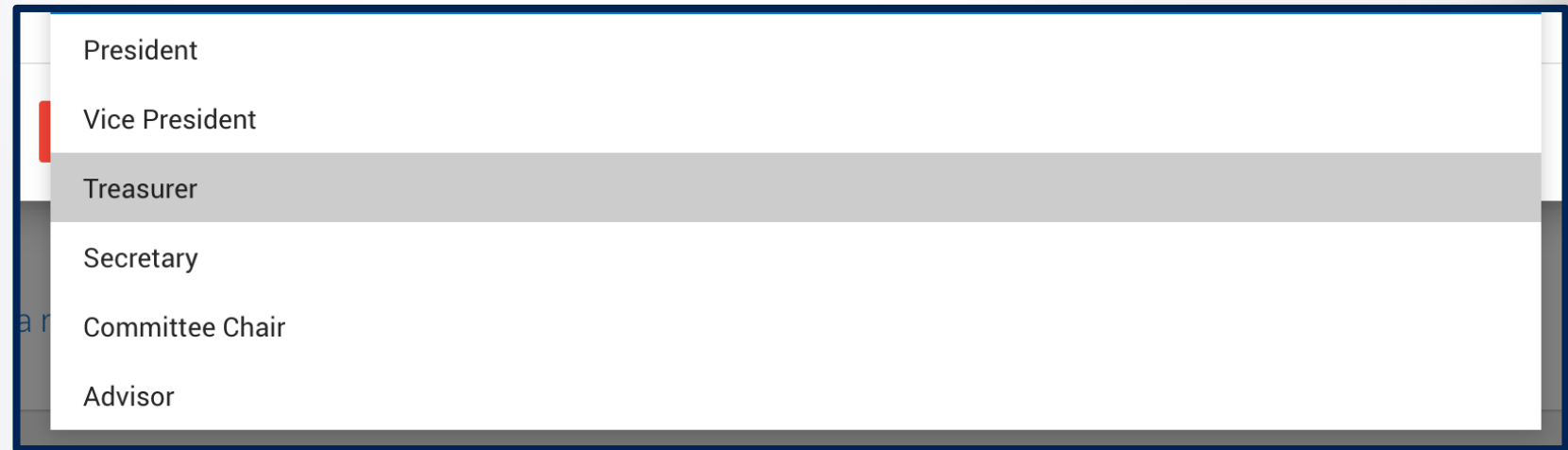
10. Confirm and you are all done!
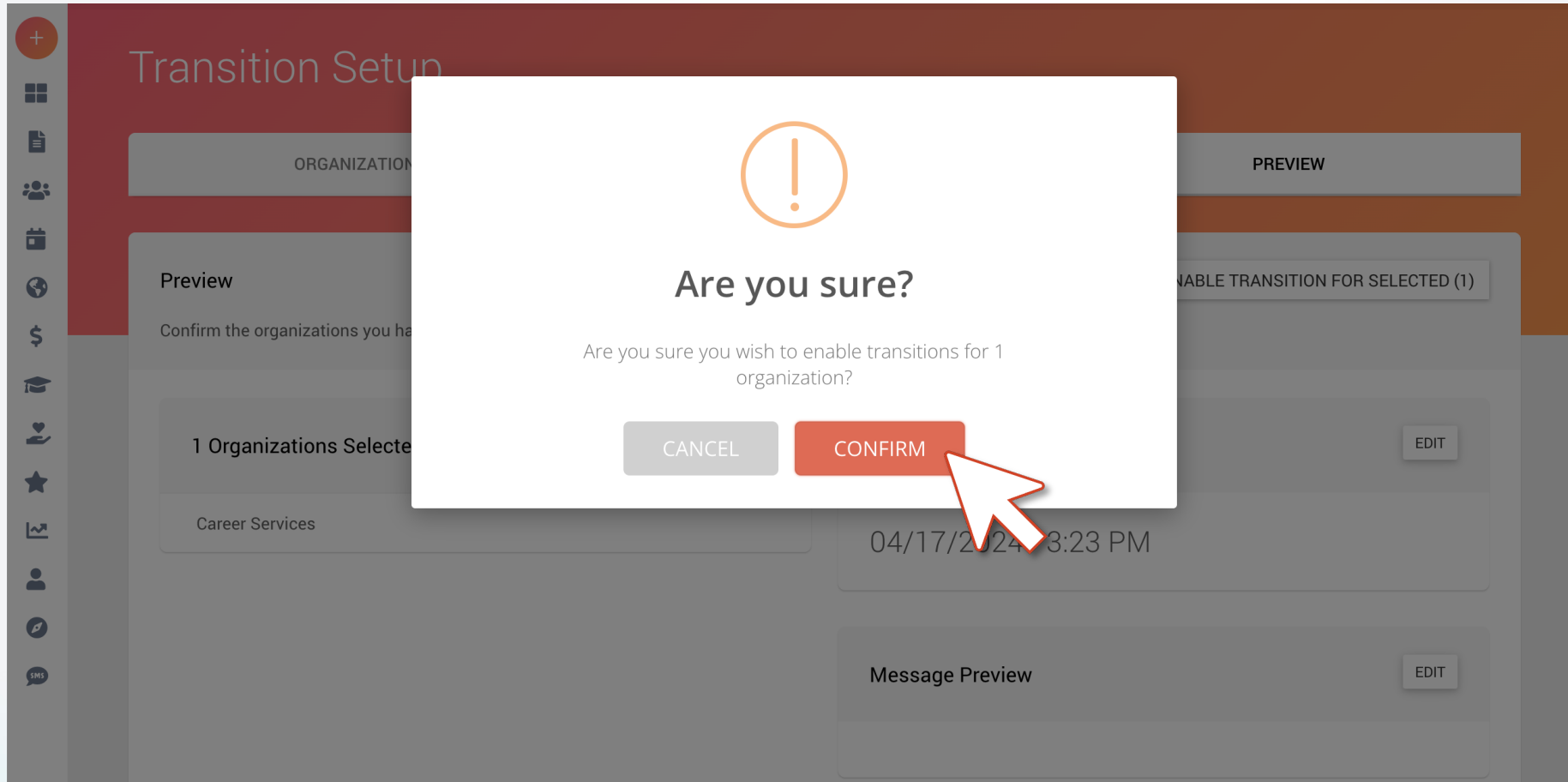
Reminder: Notification goes to…

- **ALL Leaders**
  - President
  - Vice President
  - Secretary
  - Treasurer
  - Committee Chair
  - Advisory

- **ALL Advisors**

| President |
| Vice President |
| Treasurer |
| Secretary |
| Committee Chair |
| Advisor |

Complete Transitions

(as an organization leader)

1. Go to the Organization Landing Page
2. Find your organization

3. Click the three stacked dots
4. Select "Transition"

5. This will bring you to your organization form.
6. You have to change SOMETHING to show the "Submit Button"
6. Fill out all required fields, make updates to information and roster!

Transition

How was the year?

Contact Information

Contact Name

Contact Email

Social Media

Cover Image *
The cover image should represent something about your organization. We recommend NOT including text as the image is resized and text overlayed automatically.

7. Scroll back up, hit "Submit for Approval"

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Organization Transition

SUBMIT FOR APPROVAL ▾

Basic Information

Organization Name *

Delta Delta Delta

About

| H1 | H2 | H3 | H4 | H5 | H6 | P | PRE | " |

| B | I | U | S | | | | |

</> WORDS: 8   CHARACTERS: 32

Can I help ya, help ya, help ya?

Personalize the Process!

Why are you asking organizations to complete the transition process?

29

Do you want to gather information?

Do you want to have leaders reflect?

?

Do you want to gather information?

Do you want to have leaders reflect?

?

30

What are you LEARNING?

Possible custom questions

- Did you update your officers? YES/NO
  - This is HUGE because it automatically updates permissions
- Did you add new constitution? YES/NO
- Ask students what their goals are
- What success they had this year
- What challenges they had this year
- How can your office offer support to their organization this year…
- *Ask for more suggestions in the comments?*

Customize your organization registration form

1. Navigate to the forms page on your admin portal

2. Select "Edit" on your Organization Registration Form

4. Add your custom transition questions and information.

Organization Registration

Register your campus group.

Categories *

Meeting Time   Meeting Loca

Transition

You will need to complete the campus safety training before the start of next semester. Sign up h

What are your goals for next year? *   How was the year?

How do you rate support from the Student Affairs office?

| 1 | 2 | 3 | 4 | 5 |

‹ Form Builder

FIELDS   FORM SETTINGS

Basic

| ⌶ Text | ❶ Number | ☰ Choice |

Advanced

| 🕐 Date/Time | 🕐 DateTime | ✉ Email |
| ⬆ File Upload | ✎ Signature | 🔍 Image Search |

Layout

| ⌶ Content | 👥 Field Group | ᴛᴛ Header |
| 🖼 Image | | |

5. Make them "required" if you want to make sure they're answered.

6. Select "Conditionals"

Transition

What are your goals for next year? *

How was the year?

How do you rate support from the Student Affairs office?

| 1 | 2 | 3 | 4 | 5 |

Contact Information

Cover Ima
The cover imag
including text a

Contact Name

UPLOAD

Field Description

Field Size

| X-SMALL | SMALL | MEDIUM | LARGE |

☐ Hide Response From Admin

☐ Hide Response From Portal

Field Group Settings ›

Conditionals ›

7. Select "Show" if "All" of the following match. "Registration Status" "Is" "Transition."
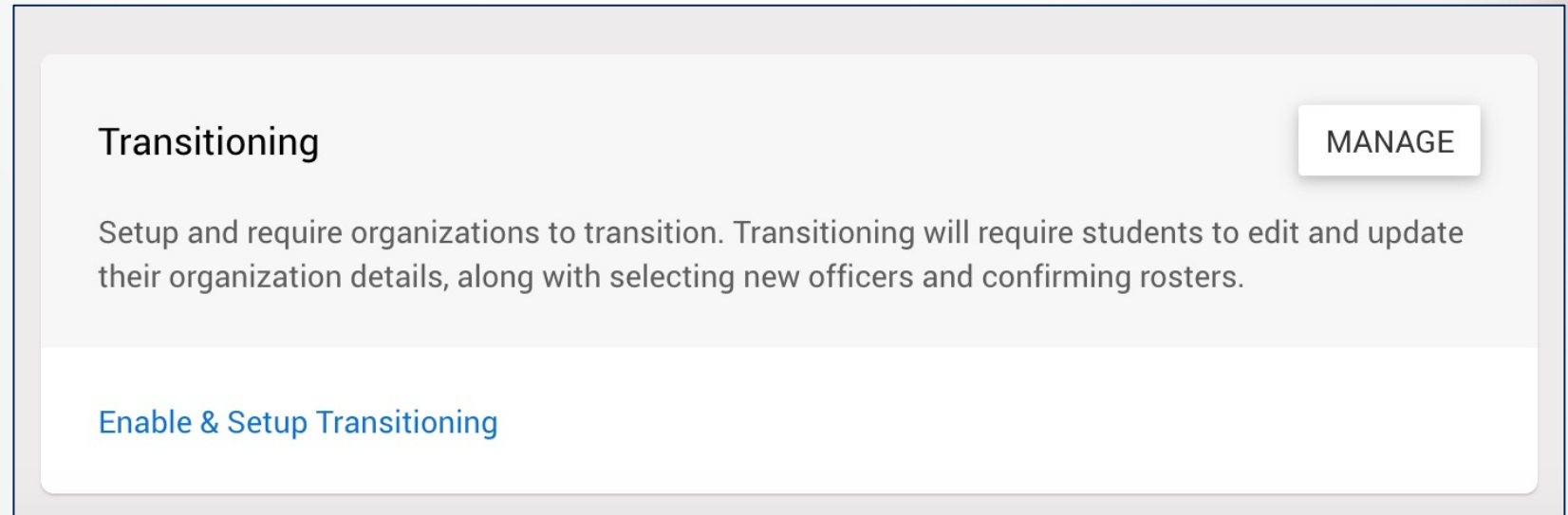
Check in on transitions

Check on Transitions

- Go to "Manage"

- Scroll to "Transitioning"

- Click "Manage"

Transitioning

MANAGE

Setup and require organizations to transition. Transitioning will require students to edit and update their organization details, along with selecting new officers and confirming rosters.

Enable & Setup Transitioning

Check on Transitions

- You will see all organizations in the transitioning process
- Select those you would like to message / deactivate

Organizations Failing The Transition Required Requirement

NEXT STEP

Select organizations you would like to notify or deactivate. By default, all are selected.

🔍 Search Organizations

✓ TRANSITION STATUS ▾ CATEGORY ▾

Name		Last Notified	Members	Categories	Transition Date
Career Services		Never	0	Department	4/17/2024, 3:23:31 PM
Cooking Club		Never	2		4/12/2024, 2:01:46 PM
Delta Delta Delta	Past Due	Never	3	Greek Life	8/31/2023, 1:41:33 PM
Roller Derby	Past Due	Never	3	Intramural Sports	8/31/2023, 1:41:33 PM
The Creme de Bananas	Past Due	4/10/2024, 11:28:45 AM	3	Club	8/31/2023, 1:41:33 PM
Trashy Cricketinis	Past Due	Never	0	Club, Service	8/31/2023, 1:41:33 PM
Walking Around	Past Due	Never	4	Club	8/31/2023, 1:41:33 PM

Check on Transitions

- When you select organizations with "Past Due" you have two options
  - Deactivate: Will deactivate their organization
    - "Come see us if you think this was an error."
  - Notify All: Send a follow up or reminder
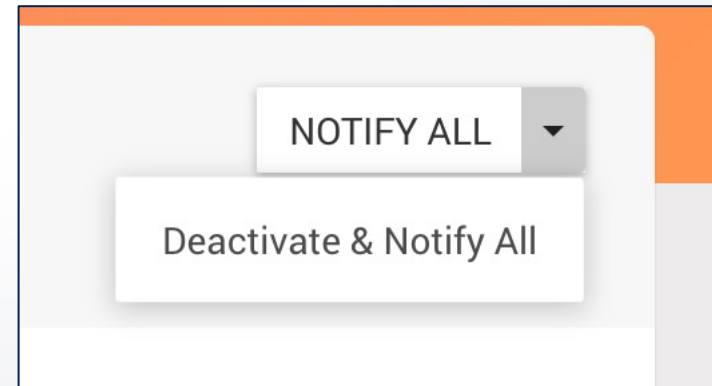
Incentives

- Tie transitioning to SGA funding

- Additional funding

- First pick for a table at the Org Fair

- Get creative!

What can you put into practice TODAY?

Q&A

Please put your questions in the Q&A box.

I'll get to as many as possible and follow up via email if more research is needed!

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Thank You

See you next month!

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