

Playbook

Leadership Transition for Student Unions and Student Governments

How to preserve institutional knowledge
and ensure continuity year after year



Introduction

Leadership transition is one of the most disruptive events in the life of a student union or student government. Every year, key roles change hands, and all too often the outgoing presidents and other officers take vital information with them.

This loss of information is the unintended result of keeping important documents such as meeting minutes, budgets, and project status reports on separate spreadsheets, shared drives, and email threads.

While new student leaders bring energy, ideas, and priorities, they are often hampered by this loss of information and must cope with incomplete information about ongoing projects and initiatives, fragmented documentation, systems they don't fully understand, and commitments without proper context.

These issues are perpetuated year after year when the student unions and governments continue to use paper-based processes, isolated systems, and inefficient workflows.

This playbook shows how process and technology can work together during times of transition to:

- Preserve institutional knowledge from one administration to the next
- Maintain governance and financial continuity
- Protect the organization from risk
- Build trust with staff, students, and the university



What should transfer every year

📍 Continuity depends on structured knowledge transfer. Financial data, governance documents, active initiatives, and system permissions should be treated as institutional assets—not personal information. A healthy leadership transition should address multiple areas, including:

Financial history and context

- Current budgets and fund balances
- Major funding decisions and why they were made
- Outstanding commitments and obligations
- Audit history and areas of risk

Governance documents and policies

- Constitutions, bylaws, and policies
- Historical decisions and precedents
- Committee structures and mandates

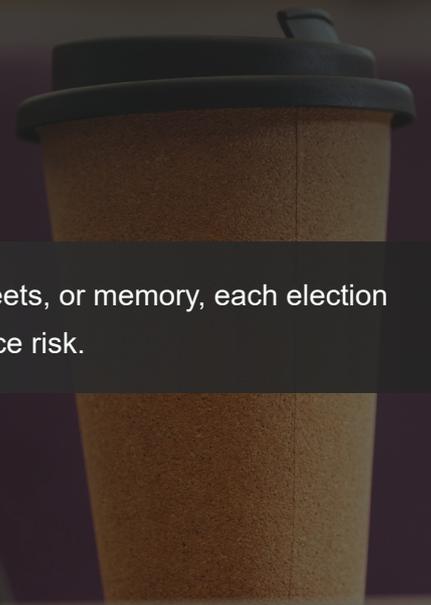
Active initiatives and commitments

- Ongoing projects and programs
- Agreements with partners and sponsors
- Long-term initiatives that span multiple terms
- Known risks, issues, and dependencies

System access and permissions

- Who has access to which systems
- Which roles should have which permissions
- Which access should be removed or reassigned
- How does a person's responsibility map to system roles

Common risk: When knowledge lives in individual inboxes, spreadsheets, or memory, each election resets organizational maturity and increases operational and compliance risk.



A framework for successful transitions

Successful organizations have an established process for transitioning leadership in student unions and student associations.

Before the transition

🔗 The current leadership team should begin preparing the incoming administration months before elections with standardized documentation and system controls:

Documentation standardization

- Ensure key documents live in a central, version-controlled system
- Use consistent templates for policies, decisions, and reports
- Eliminate personal storage locations to maintain institutional knowledge

System access review

- Review who currently has access to financial, governance, and operational systems
- Align system access to roles, not individuals
- Identify access that should be removed after the election

Data cleanup and archiving

- Close out old or completed requests, projects, and workflows
- Archive completed initiatives
- Ensure active items are clearly marked and documented

Common risk: Important files remain in personal drives and system access is not reviewed until after new leaders take office.

During the transition

📍 The current leadership team should manage the handover in a structured, systematic way—ensuring the process is controlled and deliberate, not improvised:

Transfer of permissions

- Transfer access to systems and sensitive documents based on roles and dates
- Avoid shared accounts or informal credential sharing
- Ensure outgoing leaders lose access and incoming leaders gain access in a controlled manner

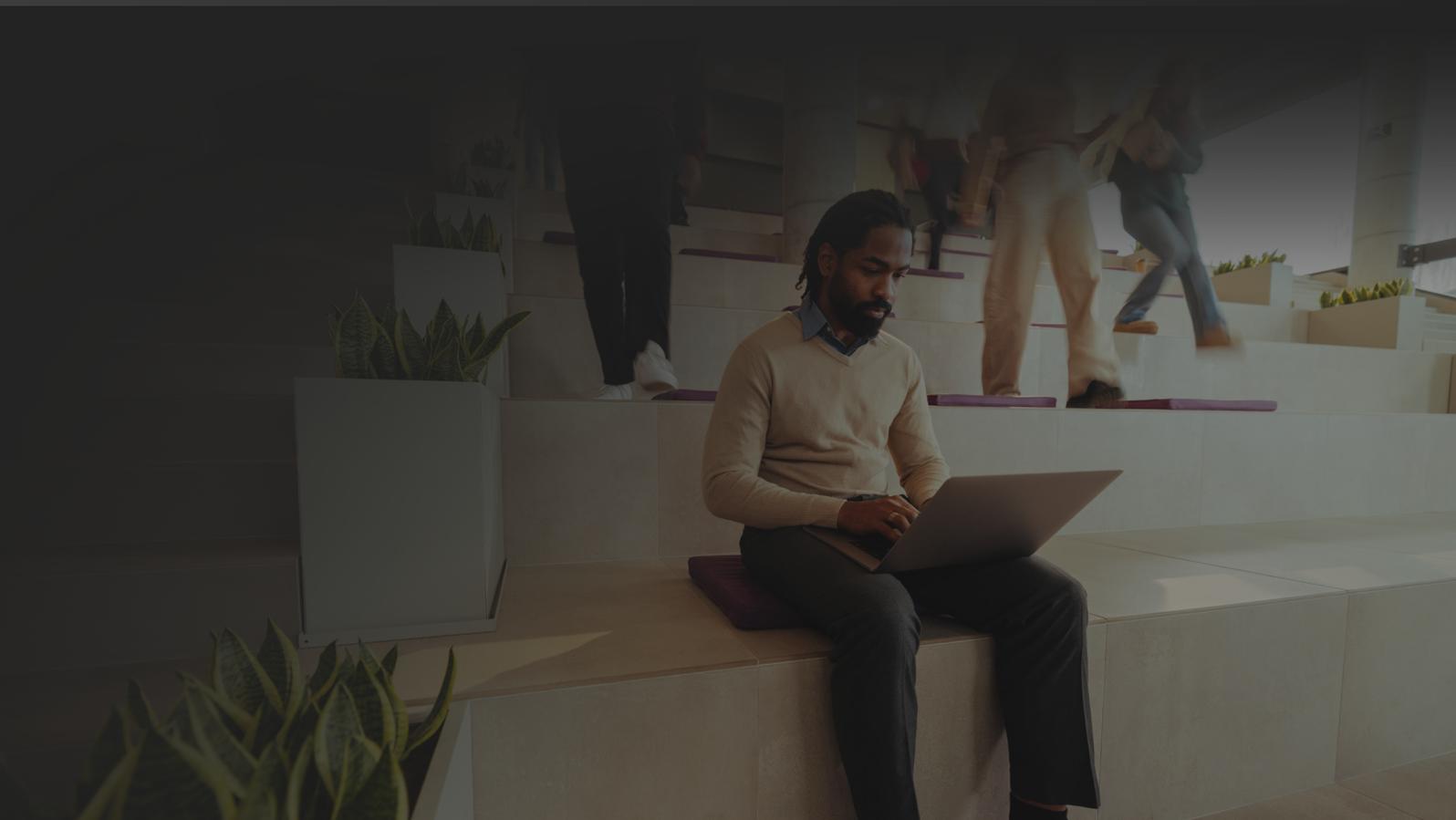
Centralized documentation access

- New leaders should start with a single, trusted source of truth for all documents
- Key materials should be easy to find, current, and clearly organized

Workflow continuity

- Financial approvals, funding requests, and operational processes should be uninterrupted
- The system should not “reset” just because leadership changed

Common risk: Shared credentials and informal handoffs create security gaps and knowledge loss.



After the transition

📍 The new leadership should inherit visibility and be ready for:

Training and role clarity

- Train new leaders on both their responsibilities and the systems that support them
- Make expectations, limits, and processes clear

Reporting and oversight setup

- Ensure dashboards and reports are available to new leaders, staff advisors, and governance bodies
- Establish regular review rhythms early in the term

Common risk: New officers spend weeks reconstructing budgets and project status instead of leading.

Start the Conversation

ArcherPoint by Cherry Bekaert helps student unions identify gaps in their finance, operations, governance, and engagement systems. We can help you ensure leadership transitions run smoothly and without incident. We also help prioritize automation opportunities and build phased roadmaps aligned with institutional goals and student experience.

Schedule a free assessment and start building a modern, resilient Student Union platform.

[Schedule Assessment](#)

