

Officer Transition

A smooth transition is the responsibility of both the outgoing and incoming members of an organization and acts as a means of providing training for new officers, closure for the outgoing leaders, and helps maintain consistency from year to year. A good officer transition begins early in the year. Encourage emerging leaders by helping develop their skills, delegating responsibility to them, sharing with them the personal benefits of leadership, and clarifying job responsibilities. When new officers have been elected, orient them together as a group with all of the outgoing officers. This process provides the new leaders with an opportunity to understand each other's roles and to start building their leadership team. Be sure to transfer the knowledge and information necessary for them to function well. An organization history and flow-chart might be helpful. Below is a list of suggestions for a successful officer transition.

Set up a meeting and/or plan a retreat

- Don't just drop off a binder and leave a note that says, "Good luck!" Make sure that the outgoing and incoming officers meet together - uninterrupted - for an hour or two (or as long as it takes to answer the questions).
- Retreats are a fun way to train new officers. Retreats held off-campus help facilitate good relationships and are a great way to avoid distractions or disturbances. Topics to consider on a retreat include: goal setting, idea brainstorming, group development, and direction of the organization. Make sure to plan some fun as well!

Share files related to your position and organization

- Copy of constitution and by-laws
- Position description of officers and members
- List of committees and their descriptions
- Member and officer contact list
- Contact information of important people/offices on campus
- List of basic annual procedures and/or calendar of annual events
- Web page and webmaster information. How do you maintain the site?
- Mission, philosophy, goals and/or purpose statement of organization
- Financial records
- Evaluations of previous and current projects
- Meeting minutes and agendas
- Any historical records of the organization

Review a calendar of the year

Take out a calendar of this school year and review it together. What were the busy times? What kinds of things should the new officer anticipate? You may not remember how crazy it was last fall, but looking at your calendar might jog your memory.

Make introductions to resources

Schedule time to walk around campus together so the outgoing officer can make introductions to the important people who serve as resources to the incoming officers (Office of Student Activities, Conferences, academic department, etc.). Make sure the new officers meet with the organization advisor as well.

Review budgets and funding

- What is the financial status of the organization?
- Where did the organization get money from this year?
- Which fundraisers worked - which didn't?
- Did the organization apply for CAB funding?
- If you are unsure about funding procedures or how to work with your organization account, visit the Office of Student Activities.

Review past and future organization events

- Which events were successful this year?
- Which should be continued?
- When should the planning start?
- Which events didn't go well? Should they be revamped and tried again or just dropped?
- Were there any pitfalls or things that could have been improved?

Meetings and organization

- Where were the meetings held? What worked? What didn't?
- Has a summer contact list been created for the organization?
- What is a typical week like?
- What were the most and least challenging responsibilities?

Recruitment activities

- What recruitment activities were done? What worked? What didn't work?
- Why did new members stick around? If they didn't, what made them leave?
- Has your organization registered for the Student Activities Fair in the fall?

Work together to make a list of things to do for the incoming officer. Which items need their attention now? Make this list together so the outgoing officer can help with direction. Make sure to trade contact information so that the outgoing officer can be a resource in the year ahead!