

# Officer Transition

Far more than simply passing on a notebook, transitioning between a new and past officer is one of the most critical tasks of a group. Why? Through successful officer transition, organizations are able to avoid extended down time when new officers are learning basics and unable to carry on activities. Incoming officers need to be fully aware of the past year's goals and what activities are underway.

Officer transition is also not a one-time meeting between old and new officers. An effective transition involves a series of meetings and information exchanges to prepare new leaders for the coming year.

This publication is designed to give new and old officers direction on how to navigate this critical time.

## Step 1: Update and organize the officer notebook (out-going officer)

1. Remove old notes, memos and other out-dated items.
2. Document all past activities this office had a part in
3. What to pass on:
  - Constitution and Bylaws
  - Job descriptions of officers and members
  - Resource or contact list of important people
  - Yearly organizational calendar
  - Organization member list with phone numbers and addresses
  - Philosophy or mission statement of the organization
  - List of organizational goals
  - Handouts (Parliamentary procedure, stress management, etc.)
  - Financial records (Treasurer)
  - Status reports on committees and projects (President)
  - Meeting minutes and agendas (Secretary and President)
  - Historical records (President, Secretary, or Historian)
  - Evaluations of past projects
  - University handbooks

## Step 2: Have one-on-one meetings with incoming officers

Take time to explain the position, including responsibilities, the constitution, budget and timeline for projects. Conversation should cover:

- Review of projects in progress as well as those annual events/duties that they are in charge of

- Identify key individuals who the officer interacts with, but in the administration and in other student groups
- Explain the budget process
- Suggestions for success and common mistakes to avoid. what I should have done was this, or This is a better way to do it. The out-going officer should help with any projects occurring during the transition time.

Step 3: New and out-going officer attend meetings of the group together.

The out going officer should introduce the new officer to the advisor and group members. After the meeting, the out going officer should introduce the new officer to members, key people at the University (i.e. Greek Life Office, Event Planning Office, Administration) and others they interact with regularly.

Step 4: Have a second one-on-one meeting for any final questions

Step 5: The out-going officers should remain available for questions in the early part of the new officer s term.

A smooth transition is:

- Both the outgoing and incoming officers work to make it successful
- A way to help the group avoid starting over or starting from scratch every year
- A transfer of significant organizational knowledge
- An opportunity for closure for outgoing members
- A great opportunity for outgoing leaders to evaluate the year
- An orientation process for new leaders
- The leadership changeover period
- A time for incoming leaders to ask questions and the outgoing leaders to give advice
- An outgoing leader s last chance to say, I wish I d done this...

Retreats

A good time to pass the torch is during an officer retreat. These can be several hours one day, or a weekend-long activity.

Outgoing/Incoming officer retreats should include:

- Icebreakers (can be done throughout the retreat)
- Evaluation of year s events by out-going officers
- Officer exchanges (notebooks, lists of duties, etc.)
- Goals report by outgoing officers. Outgoing officers depart, leaving new officers
- to discuss the coming year
- Expectations of one another

- Goals for the coming year
- Ideas and calendar of events
- Closing - motivational

Retreats for new officers only should include:

- Icebreakers (learning names, etc.)
- Review of constitution, bylaws, and policies
- Self-expectations, and expectations of one another, advisors, members
- Teambuilders (throughout retreat)
- Goals for the coming year
- Budgeting
- Events for the coming year/calendar
- Closing - motivational

Have the outgoing officers answer the following questions on paper before the training/transition event and share their answers with the new officers:

Outgoing officers:

- Describe the duties of this office.
- What was your biggest frustration with your office? How could it be avoided in the future?
- What was your biggest success in this office?
- What was your biggest surprise with this office?
- What were your goals? Did you meet them? Why or why not?
- How do the general members perceive this office?
- What was the Executive Board's biggest success this year? Why were we able to achieve this success?

Incoming officers:

- Describe the duties of this office.
- What questions do you have for the outgoing officer?
- What are your goals for this office?
- How do general members perceive this office? How would you like them to perceive it?
- How do you plan to work effectively with the other members of the Executive Board?
- What do you hope to learn the following from your experience this year?