

Officer Transition QUICK TIPS

The transition of leadership for your organization is vitally important and may determine the effectiveness of the group for years to come. A smooth transition is: The responsibility of both the outgoing and incoming officers

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..."

First Things First!

Arrange for your new officers get a chance to:

- Become acquainted with office surroundings
- Go through organizational and personal files
- Meet with advisor(s)
- Be introduced to important campus personnel

Keep A Written Record

The following information should be given to each new officer in a notebook:

- 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 on appropriate topics (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

Retreats

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

What We Really Want to Know Is...

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?
- I hope to learn the following from my experience this year.