

Leadership

TRANSITIONING

Why Transition?

A smooth officer transition will not only improve the abilities of newly elected officers, it will decrease the amount of time each officer spends “learning” their position. Through an effective transition, the incoming officers will be able to learn from the experiences of the previous officers and offer continuity and continued growth for the organization. The transition of leadership for your organization is the single most important event in a viable student organization’s year.

A smooth transition is...

- The responsibility of both the outgoing and incoming officers
- A way to help the group avoid starting over or from scratch each year
- A transfer of significant organization knowledge
- A sense of closure for the outgoing officer
- A utilization of the valuable contributions of experienced leaders
- A time for the new leadership to absorb the expertise of the outgoing members
- A great opportunity for outgoing leaders to evaluate the year
- An orientation process for new leaders
- A time for the incoming leaders to ask questions and the outgoing leaders to offer advice
- An outgoing leader’s chance to say, “I wish I had done this...”

Transitioning should occur both one-on-one and as a group meeting or retreat. Individual officers should plan one on one transitioning meetings with their incoming counterparts. An Executive board transition meeting, with both incoming and outgoing officers should also take place.

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Here are a few thoughts to keep in mind about one-on-one transition meetings:

- A transition binder or online files should be kept and maintained throughout each officer's term.
- Google Docs/drive is a great place to keep transition materials, which can then be shared with incoming officers.
- Transition Binders/online files should include:
 - The officer manual for the position, job description, and/or a list of duties, responsibilities, expectations
 - A copy of the organization's constitution and by-laws
 - All current forms relevant to the position
 - A record of activities over the past year
 - A "year in the position" or a timeline of events and responsibilities
 - Recommendations for the coming year
 - Resources relevant to the office, such as contact information
 - Other pertinent campus information
 - A letter to the incoming officer
- One-on-one meetings should occur more than once before incoming officers begin their terms and all transition material should be addressed.

Here are a few things to keep in mind when planning a retreat or transition meeting:

- Request that all outgoing and incoming officers be present for the transition meeting/retreat. Provide at least 2-3 weeks notice for all officers.
- Contact your organization's advisor and be sure he/she and the advising team are aware of the date. Provide at least 2-3 weeks notice for all advisors.
- Reserve a room on campus or elsewhere at least 3 weeks in advance.
- Will there be any budgetary concerns? If so, be sure to speak with the treasurer. Will you serve lunch? Snacks? Do you need any office supplies? (Butcher paper, markers, tape, etc.)

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- What will the length of the retreat be? What will be on the agenda? Goal setting? Brainstorming? Icebreakers?

Here are some questions to guide the officer transition meetings or retreats:

Outgoing Officer Questions

- Timeline of major tasks/responsibilities – be sure to include deadlines (use a separate sheet if needed).
- Budget – be sure to indicate typical expenses and sources of income for which you were responsible, budget deadlines, ideas for new income, etc..
- Contact people – with addresses, phone numbers, emails, and areas of responsibility.
- Attach a copy of the completed version of any forms for which you were responsible.
- Activities and Resources Expo/Activities Fair table plans and suggestions.
- Review procedures and rules and recommend any needed change.
- What problems or stumbling blocks did you encounter as an officer?
- How were these problems or stumbling blocks dealt with?
- What aspect(s) of the term went really well?
- What is the best advice you got when you started the position?
- What recommendations do you have for the incoming officer?
- What unfinished business still needs to be addressed?

Incoming Officer Questions

- What is the purpose of my office?
- What are my responsibilities?
- How can I improve what the former officer accomplished?
- What new/old programs do I plan to use during my term?
- What are 3 goals I want to accomplish in the short term?

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- What action items must I accomplish to complete these short-term goals?
- What is the projected date of completion for these goals?
- What are 3 goals I want to accomplish in the long term?
 - What action items must I accomplish to complete these long-term goals?
 - What is the projected date of completion for these goals?
- What will be your greatest challenges in holding this office?

Don't forget to include your advisors in discussions! Advisors are a great resource and they have information to help make officer transition smooth and effective.