

Officer Transitions

Why are officer transitions important?

Adequately transferring knowledge and authority can have several benefits:

- Your group will not "reinvent the wheel" each year because it can build on your previous knowledge.
- Successful transitions will prevent a period of confusion when incoming officers are unprepared for their new role.
- Incoming leaders will start their jobs with increased confidence and knowledge of available resources.

Year-Round Transition Philosophy

Transition should occur all year to best prepare incoming officers for their role. Below are some ways to implement this philosophy:

- Identify emerging leaders early in the year to give them experience and exposure to resources.
- Maintain organized files including contact people, facilities, financial information, and minutes on all events and meetings.
- Electing officers in November or December provides an "overlap" period for incoming and outgoing officers to work together during the spring.
- Encourage individual meetings between incoming and outgoing officers to provide a smooth transition.

Outgoing Officers

The outgoing officers are the key and the start to a smooth officer transition. Outgoing officers should consider collecting the following information during their term in office in order to pass information effectively to incoming officers.

- *= **helpful in a physical manual or via Google Drive/Dropbox**
- *Constitution and bylaws for the organization
- *Philosophy, mission, or purpose statement of organization
- *Positions descriptions for officers
- *List of expectations of members (service hours, events/meetings attended, GPAs, etc.)
- *Description of committees (if relevant)
- *Resource list or contact list of important people, campus departments and offices, off-campus vendors or contacts
- *Listing of basic annual procedures

Adapted from publications from the Student Involvement & Leadership Center (SILC), the University of Kansas and Student Activities, Hendrix College

- registering the organization annually
- submitting a revised constitution biannually (even years)
- Student Organization Training required for presidents and other officers
- how to make T-Space reservations
- elections take place in November or December each year
- etc.

*Calendar of annual events (rough estimate of what happens each month)

*Links to Student Organization Handbook and Student Organization Resources webpage

List of current members

Handouts on appropriate topics (event planning, conflict management, goal setting, etc.)

Financial records (treasurer/accountant)

Status reports on current and continuing projects (what still needs to be finished/accomplished?)

Evaluations of previous projects

Meeting minutes and agendas (president or secretary)

Historical records of organization (president, secretary, and/or historian)

Transition Retreat

*For outgoing and incoming officers to exchange information

- Evaluation of year's events by outgoing officers
- Officer exchanges - Sharing traditions, ideas, completed projects, continuing projects, concerns, or ideas never carried out
- Filling in the gaps for incoming officers - Outgoing officers sharing what they wished someone had told them as they were starting out in their position
- Introducing incoming officers to key people such as advisors, administrators, and faculty who have helped the organization in the past
- Reviewing position descriptions to make sure they accurately describe the offices that the organization has in place

Incoming Officer Retreat

*Retreats for incoming officers should be held at the end of the fall semester or the beginning of the spring semester as the incoming officers transition into their new roles.

Activities to include:

- Icebreakers and team builders
- Review of the constitution and bylaws of the organizations
- Expectations of one another as officers
- Setting or revisiting a mission or purpose statement for the officers and/or organizations as a whole
- Goal setting for the upcoming semester and/or year
- Discuss budgeting

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- Discuss events for the semester or year

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