

Howdy!

Welcome to the Officer Transition Module. We understand how exciting the start of a new role may be for student leaders and the importance of transitioning into that role. We hope that this training provides you with both the information and tools necessary to conduct a successful officer transition.

## What Is an Officer Transition?

A successful officer transition, provides outgoing officers with the opportunity to instill their breadth of knowledge upon incoming officers.

This may be done by means of a:

- Retreat
- Training day
- Transition meeting
- One on one meetings
- Etc.



Don't I just  
have to pass  
on my  
binder?

The important thing to note is that each organization is different. Be sure to conduct a transition that is beneficial for your officers, even if that means doing things a bit different.

Becoming an officer can be very overwhelming for some individuals, so providing them with the information that will enable them to be successful in their role, is key to the continued growth of the organization. The important aspect of a transition is that outgoing officers successfully pass on the knowledge of their role within the organization to the incoming officers. An officer transition can look very different for each organization. One organization may have a weekend retreat, while others find it sufficient to schedule a meeting or training for their outgoing and incoming officers.

## Benefits of an Effective Officer Transition

- ✓ Utilizes the valuable contributions of experienced leaders
- ✓ Minimizes the confusion of leadership changeover
- ✓ Gives outgoing leaders a sense of closure
- ✓ Provides for transfer of significant organizational knowledge
- ✓ Helps incoming leadership absorb the expertise of the outgoing leadership
- ✓ Increases the knowledge and confidence of the new leadership
- ✓ Minimizes the loss of momentum and accomplishments for the group

Here you will see some, of the many benefits, that are a result of a successful officer transition. Take a minute to read over these. On the following slides, we have provided you with reflection questions that pertain to officer transitions. While reviewing each question, think about your organization and the information that would benefit it's future leaders.

## What Do I Do First?

**Prior to an officer transition you may want to ask yourself or discuss with your executive board and advisor:**

- ✓ What information is important for the new officers to have?
- ✓ What is the most effective way to pass on information for each position?
- ✓ What resources and contacts can you leave new officers?
- ✓ Are there relevant processes, rules, or guidelines new officers should be aware of?

## Documentation to Share

- ✓ Copy of Organization Constitution and By-laws
- ✓ Position description of officers and members
- ✓ List of committees and their description
- ✓ Member & officer contact list
- ✓ Contact information of important people/offices on campus
- ✓ List of basic annual procedures and/or calendar of annual events

**Training**



Understanding of  
important  
documentation and  
processes



## Documentation Continued

- ✓ 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





## Topics to Address

- ✓ **Goals:** Review the group's goals for the previous year
- ✓ **Programs and Activities:** Evaluate what your group did
- ✓ **Membership:** Evaluate number of members and their commitment to the organization
- ✓ **Officers and Organizational Structure:** Evaluate officers and organizational structure
- ✓ **Organizational Operations:** Evaluate finances, communication, etc.
- ✓ **Advisor Involvement:** Evaluate both quality and quantity
- ✓ **Public Image:** Evaluate how other groups perceive you

# Goals

Review the group's goals for the previous year

- ✓ What did we hope to accomplish?
- ✓ How well did we do on each goal?
- ✓ Which goals should the organization continue to pursue this year?
- ✓ Which goals need to be changed?
- ✓ Which goals are no longer feasible?



# Programs and Activities

Evaluate what your group did

- ✓ How effective were the programs / activities we sponsored?
- ✓ Did we have a good balance in our schedule of programs and activities?
- ✓ Were our programs and activities consistent with our goals?
- ✓ Which activities and programs do we want to repeat?

# Membership

Evaluate number of members and their commitment to your organization

- ✓ Do we have too many, too few, or just the right amount of members?
- ✓ Were our recruitment efforts successful?
- ✓ Are our members as actively involved as we want them to be?
- ✓ Were there chances for members to get involved in a meaningful way?

# Officers and Organizational Structure

## Evaluate officers and structure

- ✓ Are officer roles and responsibilities clearly described?
- ✓ Did officers work as a team, or is there more teamwork needed?
- ✓ Is the time and effort required in each office comparable?
- ✓ Is there two-way communication between officers and members?
- ✓ How do the members feel about the officers?

# Organizational Operations

Evaluate finances, communication, etc.

- ✓ Were the finances adequate for our group, and managed properly?
- ✓ Were meetings run effectively? Was their frequency adequate?
- ✓ Did the committee structure work?
- ✓ Did we have scheduling conflicts with other groups or activities?



# Advisor Involvement

Evaluate both quality and quantity

- ✓ Did our advisor provide the support we needed?
- ✓ Did we give our advisors and other faculty a chance to get involved?
- ✓ How could we improve advisor involvement?

# Public Image

Evaluate how other groups perceive you

- ✓ How do we see ourselves? Is this how “outsiders” see us?
- ✓ How can we enhance our image?



Positive  
Reputation?



Negative  
Reputation?

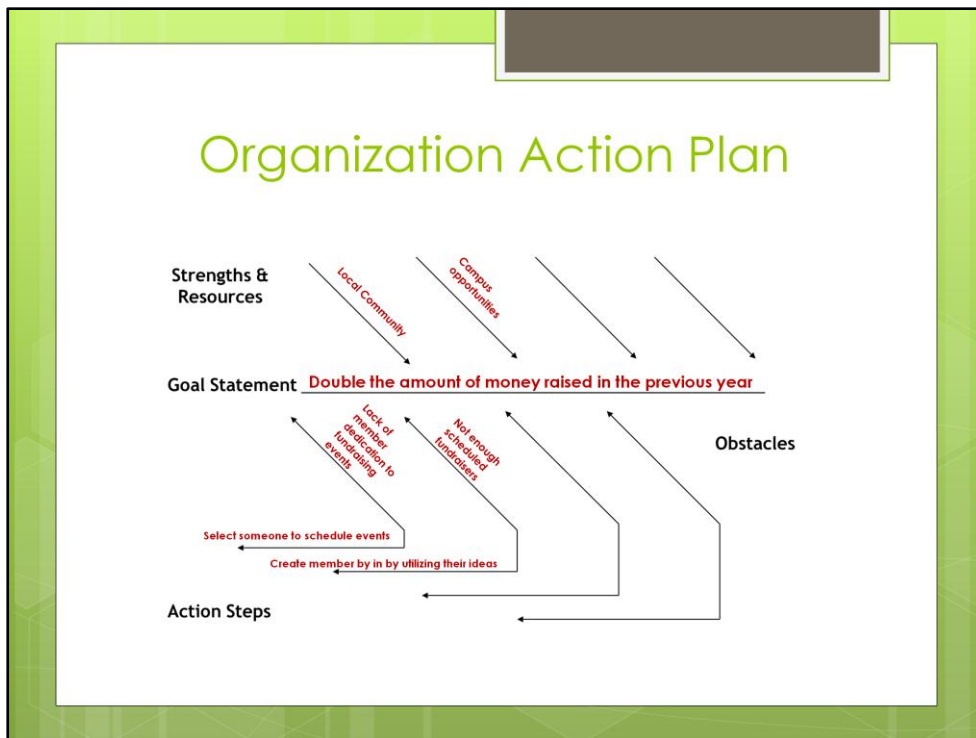
## New Officers

### Set Goals for upcoming year

- ✓ Goals should be set for the short and long term
- ✓ Goals should have effective benchmarks to assess your progress toward the accomplishment of those goals
- ✓ Goals should be specific and measurable



We hope that you were able to recognize some of the important aspects of your organization to consider while planning your officer transition. Now it's time to talk about the new officers of your organization. It is important for new officers to have the opportunity to make a positive impact on the organization. After learning about what each position entails and the roles that the new officers will fulfill, it is time to set goals for the next year! The Action plan on the next slide will help you to think through the logistics of each goal you make.



In creating your organization's goal action plan, the first step is to recognize a goal that you hope to achieve. For this example, we used "double the amount of money raised in the previous year". When you have realized your goal, understanding the obstacles and resources associated with that goal is important. We used "lack of member dedication to fundraising events" and "not enough scheduled fundraisers" as two obstacles and "the local community" and "the Campus community" as resources. An understanding of the obstacles and resources available to your organization enables you to initiate action steps to overcome the obstacles and achieve your goal. In this example, "selecting someone to schedule events" and "utilizing your members fundraising ideas" will help your organization to reach its goal of doubling the amount of money raised from the previous year.





## Student Activities Resources

- ✓ Files Tab on your organization's StuAct online account
- ✓ Pre-Event Planning Archives
- ✓ Recognition Checklist
- ✓ Organization Advisor
- ✓ Organization Manual
- ✓ SOFC Statements

Student Activities provides a number of transition resources for your student organization. By logging into StuAct online, one has the ability to access their organization's File's tab, which can house transitional documents, your pre event planning archives, your organization's recognition checklist, and your SOFC statements. In addition to these resources, you will have access to the Student Organization Manual which contains valuable information pertaining to student organizations. Your organization's advisor is also a great resource to utilize.

## Things to Remember

- ✓ Start Early!
- ✓ Officer transition is a year long process
- ✓ Know the tools and resources available to your organization
- ✓ Prepare for the Officer Transition by having the accurate documentation ready and coming prepared to assess where the organization has been and where it is headed.
- ✓ Ask Us! The Student Organization Development and Administration team in Student Activities is more than happy to answer any questions you may have or conduct a transition workshop.

We know that this may seem like a lot of information to absorb, so take a second to exhale!

Remember that an officer transition is a year long process. By starting early, the documentation and information that you pass down to the next executive board member will be more thought out and complete. Be prepared for the transition and remember that we are always here to help!

Thank you for taking the time to complete the Officer Transition training! We hope that the information we provided will help you to successfully plan and implement an effective officer transition. Good Luck!