



OUTGOING OFFICER TRANSITION GUIDE

Before the newly elected officers of your organization officially assume their responsibilities, it is wise for the old and new officers to get together for a “transition meeting.” Through such a transition meeting, the new officers will be able to learn from the experience of the outgoing officers and offer continuity and continues growth for the organization. A casual, open atmosphere should be encouraged so that the organization can benefit from an honest evaluation of the accomplishments and problems of the previous year. The following outline can help you make your transition meeting go as smoothly as possible.

- I. **Welcome and Introductions**
(Help participants get acquainted and explain the purpose of the meeting)

- II. **The Year in Review**
 - a. **GOALS**
 - i. What did we hope to accomplish?
 - ii. How well did we do on each goal?
 - iii. Which goals should be carries on this year?
 - iv. Which goals need to be changed?
 - v. Which goals are no longer feasible?
 - b. **PROGRAMS AND ACTIVITIES**
 - i. How effective were the programs/activities you sponsored?
 - ii. Did we have a good balance in our schedule of programs?
 - iii. Were our programs and activities consistent with our goals?
 - iv. Which activities and programs do we want to repeat?
 - c. **MEMBERSHIP**
 - i. Do we have too many, too few, or just the right amount of members?
 - ii. Were our recruitment efforts successful?
 - iii. Are our members as actively involved as we want them to be?
 - iv. Were the chances for members to get involved meaningful?
 - d. **OFFICERS AND ORGANIZATIONAL STRUCTURE**
 - i. Are officer roles and responsibilities clearly described?
 - ii. Did officers work as a team, or is there more teamwork needed?
 - iii. Is the time and effort required in each office comparable?
 - iv. Is there two-way communication between officers and members?
 - v. How do the members feel about the officers?
 - e. **ORGANIZATIONAL OPERATIONS**
 - i. Were the finances adequate for our group, and managed properly?

- ii. Were meetings run effectively?
 - iii. Was their frequency adequate?
 - iv. Did the committee structure work?
 - v. Did we have scheduling conflicts with other groups or activities?
 - f. FACULTY INVOLVMENT
 - i. Did our advisor provide the support we needed?
 - ii. Did we give our advisors and the other faculty a chance to get involved?
 - iii. How can we improve faculty involvement?
 - g. PUBLIC IMAGE
 - i. How do we see ourselves? Is this how “outsiders” see us?
 - ii. How can we enhance our image?
- III. Your Legacy to the New Officer Team
 - a. What are the current strengths and weaknesses of the group?
 - b. What is the best advice you can give your successor?
 - c. What were the major challenges and accomplishments in your team?
- IV. Officer Transition: Have the new and outgoing officers meet individually to discuss
 - a. Responsibilities of the position, with a job description
 - b. A timetable for completion of annual duties
 - c. Unfinished projects
 - d. Important contacts and resource persons
 - e. Mistakes that could have been avoided
 - f. Advice for the new officer
 - g. Any questions the new officer might have
 - h. Where the outgoing officer can be reached with future questions
- V. Wrap-Up
 - a. “Pass the gavel” in a semi-official ceremony and wish everyone luck!
 - b. Provide an opportunity for informal socializing.

Adapted from: The Wichita State University Student Organizations’ Handbook (92-93)

BINDERS/FILES/NOTEBOOKS SHOULD INCLUDE:

- 1. University Mission Statement**
- 2. Organizational Mission Statement**
- 3. Organizational Constitution and By-Laws**
- 4. Organizational Policies and Procedures**
- 5. Governing Organization Constitution and By-Laws**
- 6. Important names and numbers (contact list)**
- 7. Student leader job descriptions**
- 8. Budget information**
- 9. Year-end reports and evaluations**
- 10. Pertinent correspondence**
- 11. Resource list**
- 12. Organizational calendar**
- 13. Important forms**
- 14. University policies and handbook**
- 15. Organizational goals - both met and unmet**
- 16. Name and contact information of outgoing officers**
- 17. Unfinished project information**
- 18. Organizational goals**
- 19. Specific officer/Position goals**
- 20. Judicial policies - Organizational and University**
- 21. Agendas and meeting minutes**
- 22. Committee reports**

OUTGOING OFFICER TO-DO LIST

- 1. Organize all notebooks and files**
- 2. Finish all necessary correspondence (emails, phone calls, etc.)**
- 3. Prepare year-end report and evaluation**
- 4. Develop action plan and time-line for new officer transition**
 - a. Including but not limited to:**
 - i. Necessary meetings attended & conducted**
 - ii. Important tasks**
 - iii. Sharing tasks and duties with other group members**
 - iv. Introductions to key people/relationship building**
 - v. One on one meetings and training**
 - vi. Financial information**
 - vii. Leadership training**
- 5. Complete outgoing officer information sheets**
- 6. Prepare/update officer handbook**
- 7. Complete outgoing officer worksheets**

OUTGOING OFFICER WORKSHEET

(To be completed before transition meetings & training)

Please think through and respond to the following questions regarding your responsibilities.

This information will be helpful to your successor.

- 1. What I liked best about my job...**
- 2. What I liked least about my job...**
- 3. The most difficult decision I made was...**
- 4. What I could have done to make the experience better was...**
- 5. Obstacles to performing my job effectively were...**
- 6. Aids that assisted me in handling my job were...**
- 7. Things I wish I'd known before I took the job were...**

MAINTAINING CONTINUITY:

TRANSITION QUESTIONS

DIRECTIONS: Many of these questions are geared toward former, or outgoing officers. They should be considered carefully and communicated to the newly elected officer. New officers can use these questions to brainstorm ideas or goals for the upcoming office term.

- 1. What do you perceive to be your organizations objectives & goals?**
- 2. What do you consider to be the responsibility of your office?**
- 3. What do you wish you had done, but did not?**
- 4. What did you try that did not work? Why did it not work?**
- 5. What problems or areas will require attention within the next year?**
- 6. Who was the most helpful in getting things done? (Who were good resources?)**
- 7. What should be done immediately in the fall?**

ONE-ON-ONE MEETING HANDOUT

This handout will assist in officer transition by focusing upon past accomplishments and providing a critique of the year in office. This report should serve as a supplementary resource in planning for the new officer's term.

OFFICE:

NAME:

DATE:

1. List other officers/chairmen with whom you worked and the projects involved.
2. List specific accomplishments realized during your term in office and the reasons for their success.
3. List any problems or disappointments you encountered as a part of your office and suggest ways of avoiding or correcting them.
4. List any supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, university/college officers, community resources, etc.
5. Comment on the timetable applicable to your office. Give suggestions for increasing efficiency and effectiveness.
6. List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

INCOMING OFFICER TRANSITION GUIDE

Your Role as a Student Leader

- 1. WORK ON THE MORALE OF YOUR GROUP MEMBERS**
Unless they feel good about their roles, your group members will not be as cooperative and productive as they could be.
- 2. EXPECT ANY CHANGES TO BE ACCEPTED GRADUALLY**
Sometimes we expect people to accept changes overnight that we have been thinking about for months. Remember that it is almost impossible to change people...they usually must change themselves.
- 3. BE AVAILABLE TO HELP THOSE WHO WANT YOUR HELP**
When we attempt to force our ideas of assistance when it hasn't been solicited, we risk building resistance among our group.
- 4. LET YOUR GROUP MEMBERS DETERMINE THE GROUP'S PURPOSE**
Unless group members have a say in what is to happen, their participation will be half-hearted at best.
- 5. EMPHASIZE THE PROCESS FOR WORKING THROUGH PROBLEMS RATHER THAN THE FINAL RESULT.**
Your desired results may change as your group changes. An open channel of communication, which involves all group members, will help you incorporate these changes.
- 6. APPROACH CHANGE THROUGH COOPERATIVE APPRAISAL**
When change is based on evidence, it reduces the chances for a win-lose situation. The decision will be based on what is right, rather than who is right.
- 7. ENCOURAGE BRAINSTORMING AND CREATIVITY**
Provide feedback and support for new ideas and avoid penalizing for mistakes made for the sake of experimentation.
- 8. SHARE DECISION REGARDING POLICIES AND PROCEDURES**
By emphasizing how to solve problems, and involving your members in these decisions, you will create a deeper commitment in your members.
- 9. RECOGNIZE CRITICISM AS THE FIRST STEP INDIVIDUALS TAKE IN ASSUMING RESPONSIBILITY** Use criticism as a chance to solicit suggestions for improvement.

10. SHARE THE GLORY

You cannot expect enthusiastic participation if you take all the credit.

11. HAVE FAITH AND CONFIDENCE IN THE ABILITY OF YOUR GROUP

People tend to live up to our expectations, be they high or low.

12. BE SURE YOUR GROUP HAS COMMON PURPOSE

Structure meetings so that issues of common interest are discussed with the whole group, and individual concerns are addressed at other times.

13. TRUST THE MOTIVES OF ALL GROUP MEMBERS

Attend to every suggestion as a sincere one, which deserves a sincere response.

14. DON'T SET YOURSELF UP AS INFALLIBLE

Be honest and admit when you lack an answer. Don't be afraid to be human.

15. BE SPECIFIC

Communicate exactly what you expect and think.

16. BE SOCIALLY SENSITIVE

Avoid being witty or funny at the expense of group members.

17. USE THE INQUIRY METHOD

Use questions to get information and define issues.

18. BE IMPARTIAL

Play no favorites and give all group members equal chance to participate.

19. PROMOTE GROUP COHESIVENESS

Make all group members feel as if they belong.

20. MANAGE CONFLICT, DON'T IGNORE IT

Bring conflict into the open, and concentrate on issues, behaviors and facts rather than personalities.

INCOMING OFFICER TRANSITION WORKSHEET

(Questions to ask during transition)

Please think through and respond to the following questions regarding your responsibilities. This information will be helpful to your successor.

1. Things specific to the position I want to know about...
2. Things I should do over the summer...
3. People (positions) that I should get to know...
4. Services that I need to know about...
5. Things I need to know about working with my advisor...
6. Other questions I want answered...

MAINTAINING CONTINUITY: TRANSITION QUESTIONS

DIRECTIONS: Many of these questions are geared toward former, or outgoing officers. New officers can use these questions to brainstorm ideas or goals for the upcoming office term.

- 1. What do you perceive to be your organizations objectives & goals?**
- 2. What do you consider to be the responsibilities of your office?**
- 3. What are you expectations of yourself in the office?**
- 4. What expectations do you have of the executive council?**
- 5. What expectations do you believe your members have of you?**
- 6. What problems or areas will require attention within the next year?**
- 7. What should be done immediately in the fall?**

8. Who do you anticipate will be the most helpful in getting things done? (People outside your org such as advisors, staff.)

9. Write down one specific problem you anticipate you will encounter during your term.