

Tips for a Successful Officer Transition

A successful transition from outgoing to incoming officers is the key to creating and sustaining a productive, effective organization. A transitional meeting is also vital for this process as this will be the time for the outgoing and incoming officers to discuss goals and aspirations.

Why is the transition process important?

- To provide important organizational knowledge/information
- To inform and prepare incoming officers for their new positions
- To provide a sense of accomplishment and closure for the outgoing officers
- To capitalize on the valuable contributions of the outgoing officers
- To increase the knowledge and confidence of the new leadership
- To minimize the loss of momentum the group has at the end of the year
- To provide a sense of community among the leadership and membership

Outgoing Officer

It is important to **start early** with this process. Do not wait until final exams week or graduation to transition the officers. Below are items that should be included into a binder or on a flash drive to pass down to the new leadership.

- A copy of the organization's constitution and by-laws.
- A complete position description and role classification.
- General organization information.
- Previous minutes and reports.
- Fliers, receipts, and supplementary materials from past projects.
- Evaluations of previous projects and programs.
- Clubs events and traditions
- Organizational goals and objects
- Concrete timeline and checklist for organizational projects.
- A copy of the academic calendar and important deadlines
- Resources and contact Lists
- Financial records
- Incidentals (copy codes, passwords, banking information)
- Tips (how to reserve spaces for meetings, where to get supplies, etc.)
- Outgoing officer tips and suggestions
- Incoming officer goal sheet
- Roles and expectations of officers, general members, and advisors

Incoming Officer

Incoming officers should also come to the transition meeting prepared with ideas and questions for the outgoing officer. Below are some ideas:

- What do you want to accomplish during your term?
- What ideas do you have for your position?
- What do you want to take away from this position?
- How do you see this position aligning with your personal goals?
- What skills will you need to be successful in this position?

Questions for the outgoing officer:

- What are specific things about the position I should know about?
- What should I do first? What are the most important priorities of this position?
- What did you try that did not work? Why?
- What do you wish you had done, but did not?