

Officer Transitions

One of the greatest complaints of student organization leaders is that they did not receive a proper or comprehensive transition. They often still have questions about what their role really is and about the resources available to them. This resource will provide tips for improving continuity in your organization and increasing the potential of success by new officers. Following these tips, in the long run, will save time and help avoid having to “reinvent the wheel.”

Tips for a Successful Transition

- Have a large group meeting or retreat and then do smaller 1-on-1 transition meetings.
- Keep the stuff that matters and ditch the stuff that is no longer relevant.
- Be organized, but understand that your organization style may be different than someone else’s.
- Plan for a transition while you’re in a position. Don’t wait and scramble at the end.
- Teach vs. Tell
- Know and use your resources.

The Start/Stop/Continue List

The Stop/Start/Continue List can be a valuable tool to assist with your transition. Have your members ask themselves: Are we doing anything that doesn’t make sense, and should we STOP doing these things? Are there things we’re not currently doing that we should START doing? What should we CONTINUE doing, given that they make sense and work well for our organization?

Basics of a Transition

Your transition should be designed in a way that makes sense for your organization. Your organization may be one with ten members that functions only at Gustavus or you may be part of an organization that has 50 or more members which is tied to a larger national organization.

While there are some differences in the information that will need to be passed on as well as some differences in what will be expected of you, there are some things that will remain constant.

Transitions should be planned for in advance and expected outcomes should be established. Both incoming and outgoing officers should be prepared. If they are not, you will not get the results your organization wants or needs. Do not waste anyone’s time with something that isn’t going to be productive.

It helps to have a time dedicated to a transition. If you’re going to do a retreat, be sure that it is actually a retreat from the ordinary. The importance of the transition should be evident in the setting given to it. A normal meeting room and time could work, but doing something different helps mark the significance of the time being spent on the transition exercises.

Leadership Backpack

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For Incoming Officers

Ask yourself these questions:

- What do I want to accomplish with this position this year?
- How can I build on the programs already in place and continue to support members?
- What don't I know about the position I'm getting into that I should know?
- What are things that I need to watch out for as I start?
- What should be my immediate priorities and what are the things that can wait until later in my term?

Do the following thing within 10 days of the start of your term:

- Revise the job description for your position. Make changes if necessary.
- Set goals for your term.
- Review manuals, files, and materials handed down from the previous officer. Organize loose papers or unfinished projects. Finish what you can. Get rid of what you don't need.
- Determine a schedule for yourself and make time for yourself!

For Outgoing Officers

- Pass on any passwords or technical knowledge that may be needed.
- Don't "dump" your position. You may be ready to be done, but keep in mind that your successor is excited about their new opportunity.
- Go into the transition keeping in mind that the new officer may have new ideas. Be flexible and allow them to take the reins.
- Give a "tour" of the position. Physically show the incoming officer where things are and introduce them to people they will work with.
- Teach with continuity as a goal. This is not a time to have to start over!
- Be sure that position descriptions and officer duties match what they do.

Ask yourself these questions, and provide a summary of your answers to your successor:

- What do you wish you had been told before taking this position?
- What officers and advisors do you work with the most?
- What were your biggest successes this year?
- What are ideas that you tried but which didn't work out?
- What do you recommend the next officer try?
- Did you run out of time and not get to work on a specific project you wanted to?
- What do you really do in your position?

Provide the new officer with the following:

- Updated Constitution and Bylaws
- Position descriptions and expectations of officers and members
- Resource or contact list of important people they will work with
- Listing of annual procedures (reserving rooms, requesting storage space, Org registration, etc.)
- Calendar of events (Homecoming, Family Weekend, involvement fair, national conferences, etc.)
- Organization roster with contact information
- Financial records
- Status reports on continuing projects and updates regarding the organization's established goals
- Meeting minutes and agendas
- College handbooks
- A heads-up on any concerns they may deal with (may include confidential information)