

Transitioning for Student Groups

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Most successful student groups implement some type of an "officer transition process." In order to be most effective, outgoing and incoming officers should try to have at least two weeks of overlap in their positions, so that new officers have the opportunity to work closely with outgoing officers and to best understand the roles and responsibilities of their respective positions as well as best understand the intricacies and progress of the organization. The following information can assist student groups in creating a seamless and successful officer transition period.

Transition Purpose

- To help formalize the end of an officer's term, and provide outgoing officers a sense of closure with an opportunity to reflect on their successes and think about the future of an organization
- To pass on significant organizational knowledge and history
- To prepare incoming officers for the responsibilities of their new positions
- To prevent incoming officers from "reinventing the wheel"
- To instill a sense of comfort and pride with incoming officers' new positions
- To introduce incoming officers to the advisor
- To increase the confidence of the new leadership

When and how do you prepare for transition?

EARLY AND OFTEN!

- It's never too early to prepare for transition. Transition preparation can begin as early as your first day in office!
- Transition is an ongoing process that should be part of daily operations. As an event or initiative takes place, evaluation and preparation for the next time around should be happening
- Identify, encourage and empower emerging leaders within your group as early as the first meeting
- Role model effective leadership and organizational skills

Suggestions for Effective Transition

Meetings Between Officers: Arrange a meeting with the outgoing/incoming officers and the advisor. Be sure to discuss past, current, and future issues so that the new leadership is prepared. You should also discuss the financial status of the group and reference all budgeting documents.

Binders: Create student group informational resource binders/online files for every important leadership position in the student group. The binders should consist of the student group constitution, mission, goals, officer responsibilities, event planning information which may include to-do's, checklists, evaluations, as well as important contacts from on and off campus.

Reports and Evaluations: Written reports and/or evaluations are essential for officers or student group members to complete at the close of a month, an event or semester. The report/evaluation should highlight successes, challenges, goals, contact people, projects in process, and issue(s) of high priority.

Goal Setting: Create a reflection and goal setting meeting with the entire student group membership. Find out what direction they want to take the student group--then, meet as an executive board and establish goals and objectives for the student group. These goals and objectives should become part of the student group operations. See "Setting Group Direction" worksheet.

Gathering Information: Ask questions, initiate and build relationships with offices, and tour relevant spaces or offices to gain a broader understanding and perspective to better meet the goals of your student group.

Financial Records: Finances tend to be a big issue for student groups. In many cases, the budgeting process for one semester is generally prepared a semester earlier, when previous officers were in leadership. It is difficult for new officers to always understand why a specific amount was budgeted for an event or why a service was provided in the past, and for how much? Thankfully current and some past financial records for Student Union groups are available on the SU website.

Advisor: Get the advisor involved and take advantage. If you don't have an advisor, get one. Advisors are great resources who can generally provide history and continuity for a student group. They can be the one constant in your student group. Also, if your student group runs into problems on-campus or off-campus with a vendor, the advisor can step in and help represent the group.

Communication: Communication is essential for transition!

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 Washington University in St. Louis

Outgoing Officer Questions to Consider

- What I liked best about my position...
- What I liked least about my position...
- The most difficult decision I made was...
- What I could have done to make the experience better was...
- Obstacles I faced were...
- Resources which assisted me in my job were...
- Things I wish I had known before I took office ...
- Our advisor helped me in my position by...
- The most helpful people/offices have been...
- What do I perceive my organization's objectives?
- What do I consider to be my main responsibility?
- What were my three biggest accomplishments?
- What did I try that did not work? Why?
- What do I wish I had done or tried, but did not?
- What are the three big issues or problem areas that will require attention this year?
- What should be done immediately in the next term?
- Other important information...

Incoming Officer Questions to Consider

- List 3 things (and why) that made me want to run for office:
- List 3 new ideas that I would like to implement:
- List 3 important foreseeable problems in my group and/or position:
- List possible solutions to the above problems:
- Things specific to my position I want to know about (challenges, forms, duties, etc.)
- Things I should do before the officer term begins...
- People (or positions) I should get to know...
- Services or policies I need to know about...
- Expectations I have for my advisor are...
- List three goals I have for the group
- How can I best empower/work with the executive board/group?
- How can I motivate/empower the general body?
- What legacy do I want to leave for the group?
- Other questions I want/need answered...

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Sample Officer Transition Meeting Agenda

PART I: Both outgoing and incoming officers are present with advisor

- ⇒ Overview of the agenda and discussion of the goals of the meeting.
- ⇒ History of the group: From past to present.
- ⇒ Review short and long term goals, and progression toward them. (Goal-setting activity strongly recommended, and can be acquired from the OSA staff)
- ⇒ Review of financial status and accounting history of the group. (Review past budgets requests & budget allocations)
- ⇒ External review: Overview of past year's programs, events and activities.
- ⇒ Successes
- ⇒ Areas for improvement
- ⇒ Advice for the future (Evaluation forms strongly recommended)
- ⇒ Internal review: Overview of internal group affairs
- ⇒ Successes with membership participation/development
- ⇒ Areas of difficulty/Areas for improvement
- ⇒ Advice for the future

PART II: Outgoing officers leave while incoming officers continue with advisor

- ⇒ Discussion over the role of the advisor in the student group (Advisor Expectation Checklist activity suggested).
- ⇒ Discuss goals of the student group for the upcoming year. Be sure to review long term goals established by past administrations.
- ⇒ Discuss ideas for internal student group development.
- ⇒ Discuss ideas for external programs (i.e. events and activities).
- ⇒ Discuss budget for following year (pending SU allocation, if applicable).
- ⇒ Establish dates for follow through. (i.e. create a time-line)
- ⇒ Discuss possible appointments of committee leadership.

Outgoing Officer To-Do List

- Organize all binders/notebooks and files
- Finish all necessary correspondence (letters, email, phone calls)
- Prepare year-end report and evaluation
- Develop action plan and time-line for new officer transition
- Necessary meetings attended and conducted by officer
- Important tasks
- Sharing tasks and duties with other group members
- Introductions to key people/relationship building
- One-on-One meetings and training
- Financial Information
- Leadership training
- Review responsibilities of your position and revise if necessary

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Officer Binder or Online Files

Ideally, a binder or online files should be developed and maintained over the course of the outgoing officer's term. However, in many cases, the binder is created at the last minute or was never utilized. Work to make the binder a part of the daily operations, planning and reflection of the student group. Each outgoing officer should provide a binder to their successor with the following information:

Organizational Mission Statement

Organizational Constitution & By-Laws

Organizational Policies & Procedures

Office Position Description

Specific responsibilities of the position

Any changes that are needed in the job description

Officer Time-Line

Current year calendar that indicates outgoing officer activities

Recommended dates by which tasks should be completed to fulfill responsibilities in a timely manner

Event/Project Documentation

Records of how each project, event or activity was implemented, including files on disk and hard copies.

Evaluation of Event/Project

Written evaluation from participants

Outgoing officer's feedback and recommendations

Budget

Accounting of how allocated funds were spent

Documents

Important forms

Agendas and Meeting Minutes

Officer and committee reports

Semester-end and year-end reports

Pertinent correspondence

Resources

Key resource people helpful in fulfilling responsibilities and how to contact them

Name and contact information of outgoing officers

Other Essentials

Keys, account transfers, mailbox information, passwords, access codes, etc.

Outgoing Officer To-Do List