

# Officer Transitions

---

## Center for Student Leadership Resources

What happened last year? Is your organization recreating the wheel every year? A thorough Officer Transition plan will provide an organization with continuity so that next year's officers can build on the knowledge gained rather than starting from ground zero.

### **Benefits of a Thorough Leadership Transition**

- Provides for transfer of significant organizational knowledge
- Minimizes the confusion of leadership changeover
- Gives outgoing leaders a sense of closure
- Utilizes the valuable contributions of experienced leaders, usually the most neglected members in your organization
- Helps incoming leadership absorb the special expertise of the outgoing leadership
- Increases the knowledge and confidence of the new leadership
- Minimizes the loss of momentum and accomplishments for the group

When to Start? Early! A successful Officer Transition begins with a successful Organization Orientation (see CSL Resources on New Member Orientation). Throughout the year, potential leaders should be encouraged to take on responsibilities and be kept informed about the direction the organization is moving.

### **Suggested Tasks for Outgoing Officers**

1. Organize your office, materials, thoughts, etc.
2. Finish all correspondence that you can
3. Prepare an end-of-the-year report incorporating the organization's goals, activities, and accomplishments
4. Using the invaluable hindsight that you now have, identify the areas of responsibility, people, details, phone numbers, etc. that you wish someone had told you when you took office
5. Review the Organization constitution, written material, and goals and outline any areas needing attention or revision – prepare a transition notebook
6. Set aside a structured time period to handle the exchange of information. After the meeting, make sure you are available to the new officer for any follow-up information
7. It is suggested the Organization incorporate a formal transition into your Constitution and bylaws to ensure the continuity and effective functioning of the organization.
8. When new officers have been elected, orient them together as a group with all of the outgoing officers. This process provides the new leaders with an opportunity to understand each other's roles and to start building their leadership team. Outgoing officers should openly share what they believe went well and what they would change if they had it to do over again

### **Preparing a Transition Notebook**

1. Introduction
  - Table of contents
  - Contact sheet for new leadership / membership
2. Letter from Advisor
  - Role and responsibilities (see CSL Resources on The Advisor Relationship)
  - How to get in touch with him/her
3. Historical Documents
  - Constitution
  - Mission statement
  - Goals and Objectives (see CSL Resources on Goal Setting)
  - History of Organization
  - Organizational chart
  - Job descriptions for officers
  - Committees
  - Annual programs and activities
  - Officer selection process and timeline
  - Membership recruitment process and timeline
4. Evaluation
  - End of the Year Report
  - Suggestions for the upcoming year
5. Officer Position
  - Responsibilities – the big picture
  - Procedures – the small details or the “how to’s”
  - Detailed timeline
  - List of things that need to be done immediately (i.e. register organization, etc.)
  - Resources – contact names and numbers

### **Suggested Tasks for Incoming Officers**

1. Read previous executive reports. Become conversant with the general history of the organization and its recent activities. Remember you need to know all of the little details as well as the big picture
2. Determine training and guidance you will need from the outgoing officers. This may not always be obvious. For example it may be necessary for an incoming President to meet with the outgoing Treasurer
3. Make a list of the above information (general history, recent activities, goals, procedures, etc.) you might need to know to be successful
4. Try to generate more than one resource for each item that you want to learn about.
5. Make appointments with the key people. Be thorough, this may be your only chance