OFFICER TRANSITIONS

The key to creating and sustaining a productive and effective organization

Why is this process important?
- To provide for the transfer of 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 officer
- To capitalize on the valuable contributions of experienced leaders
- 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
What you need to do if you are leaving

Each outgoing officer should maintain records of meetings, receipts, and/or events that took place within the past year. This information should be organized and stored in a way that is useful to each position, in a binder and/or electronically.

Governed Documents:
- Constitution/Bylaws
- Organizational rules/policies
- Standing rules
- Organizational goals/objectives
- Position Descriptions
- End of semester officer report

Key Contacts/Resources:
- List of university resources and contact information (Student Activities staff, organization advisor etc.)
- List of community resources and contact information (vendors for events, sponsors/donors, etc.)

Other:
- Budget information
- Calendar of events for last year
- Records of past years activities
- Lists of events, tasks, deadlines for particular position
- Copies of significant correspondence
- Previous meeting minutes/reports

INCOMING OFFICER
What you need if you are taking a new position

Incoming officers should also come to the transition meeting prepared with ideas, and questions for the outgoing officers.

Things to think about:
- 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 do 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 did you wish you had done, but did not?