OUTGOING OFFICER TRANSITION GUIDE

Before the newly elected officers of your organization officially assume their responsibilities, it is wise for the old and new officers to get together for a “transition meeting.” Through such a transition meeting, the new officers will be able to learn from the experience of the outgoing officers and offer continuity and continues growth for the organization. A casual, open atmosphere should be encouraged so that the organization can benefit from an honest evaluation of the accomplishments and problems of the previous year. The following outline can help you make your transition meeting go as smoothly as possible.

I. Welcome and Introductions
   (Help participants get acquainted and explain the purpose of the meeting)

II. The Year in Review
   A. GOALS
      What did we hope to accomplish?
      How well did we do on each goal?
      Which goals should be carried on this year?
      Which goals need to be changed?
      Which goals are no longer feasible?

   B. PROGRAMS AND ACTIVITIES
      How effective were the programs/activities you sponsored?
      Did we have a good balance in our schedule of programs?
     Were our programs and activities consistent with our goals?
      Which activities and programs do we want to repeat?

   C. MEMBERSHIP
      Do we have too many, too few, or just the right amount of members?
      Were our recruitment efforts successful?
      Are our members as actively involved as we want them to be?
      Were the chances for members to get involved meaningful?
D. OFFICERS AND ORGANIZATIONAL STRUCTURE
   Are officer roles and responsibilities clearly described?
   Did officers work as a team, or is there more teamwork needed?
   Is the time and effort required in each office comparable?
   Is there two-way communication between officers and members?
   How do the members feel about the officers?

E. ORGANIZATIONAL OPERATIONS
   Were the finances adequate for our group, and managed properly?
   Were meetings run effectively?
   Was their frequency adequate?
   Did the committee structure work?
   Did we have scheduling conflicts with other groups or activities?

F. FACULTY INVOLVEMENT
   Did our advisor provide the support we needed?
   Did we give our advisors and the other faculty a chance to get involved?
   How can we improve faculty involvement?

G. PUBLIC IMAGE
   How do we see ourselves? Is this how “outsiders” see us?
   How can we enhance our image?

III. Your Legacy to the New Officer Team
   A. What are the current strengths and weaknesses of the group?
   B. What is the best advice you can give your successor?
   C. What were the major challenges and accomplishments in your team?

IV. Officer Transition
   (Have the new and outgoing officers meet individually to discuss)
   A. Responsibilities of the position, with a job description
   B. A timetable for completion of annual duties
   C. Unfinished projects
   D. Important contacts and resource persons
   E. Mistakes that could have been avoided
   F. Advice for the new officer
   G. Any questions the new officer might have
   H. Where the outgoing officer can be reached with future questions
V. Wrap-Up

“Pass the gavel” in a semi-official ceremony and wish everyone luck!
Provide an opportunity for informal socializing.

Adapted from: *The Wichita State University Student Organizations’ Handbook* (92-93)
BINDERS/FILES/NOTEBOOKS

SHOULD INCLUDE:

1. University Mission Statement
2. Organizational Mission Statement
3. Organizational Constitution and By-Laws
4. Organizational Policies and Procedures
5. Governing Organization Constitution and By-Laws
6. Important names and numbers (contact list)
7. Student leader job descriptions
8. Budget information
9. Year-end reports and evaluations
10. Pertinent correspondence
11. Resource list
12. Organizational calendar
13. Important forms
14. University policies and handbook
15. Organizational goals - both met and unmet
16. Name and contact information of outgoing officers
17. Unfinished project information
18. Organizational goals
19. Specific officer/Position goals
20. Judicial policies - Organizational and University
21. Agendas and meeting minutes
22. Committee reports
OUTGOING OFFICER TO-DO LIST

1. Organize all notebooks and files

2. Finish all necessary correspondence (emails, phone calls, etc.)

3. Prepare year-end report and evaluation

4. Develop action plan and time-line for new officer transition
   A. Including but not limited to:
      i. Necessary meetings attended & conducted
      ii. Important tasks
      iii. Sharing tasks and duties with other group members
      iv. Introductions to key people/relationship building
      v. One on one meetings and training
      vi. Financial information
      vii. Leadership training

5. Complete outgoing officer information sheets

6. Prepare/update officer handbook

7. Complete outgoing officer worksheets
OUTGOING OFFICER WORKSHEET
(To be completed before transition meetings & training)

Please think through and respond to the following questions regarding your responsibilities. This information will be helpful to your successor.

1. **What I liked best about my job…**

2. **What I liked least about my job…**

3. **The most difficult decision I made was…**

4. **What I could have done to make the experience better was…**

5. **Obstacles to performing my job effectively were…**

6. **Aids that assisted me in handling my job were…**

7. **Things I wish I’d known before I took the job were…**
MAINTAINING CONTINUITY:
TRANSITION QUESTIONS

DIRECTIONS: Many of these questions are geared toward former, or outgoing officers. They should be considered carefully and communicated to the newly elected officer. New officers can use these questions to brainstorm ideas or goals for the upcoming office term.

1. What do you perceive to be your organizations objectives & goals?

2. What do you consider to be the responsibility of your office?

3. What do you wish you had done, but did not?

4. What did you try that did not work? Why did it not work?

5. What problems or areas will require attention within the next year?

6. Who was the most helpful in getting things done? (Who were good resources?)

7. What should be done immediately in the fall?
ONE-ON-ONE MEETING HANDOUT

This handout will assist in officer transition by focusing upon past accomplishments and providing a critique of the year in office. This report should serve as a supplementary resource in planning for the new officer’s term.

OFFICE: ___________________  NAME: ___________________

DATE: ___________________

1. List other officers/chairmen with whom you worked and the projects involved.

2. List specific accomplishments realized during your term in office and the reasons for their success.
3. List any problems of disappointments you encountered as a part of your office and suggest ways of avoiding or correcting them.

4. List any supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, university/college officers, community resources, etc.

5. Comment on the timetable applicable to your office. Give suggestions for increasing efficiency and effectiveness.

6. List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

All Worksheets and Handouts Sourced from: NIC Retreat Workbook (verbatim, pg. 47)