

Hints for Student Organization Officer Transition

Adapted from: University of Virginia, Drexel University, Old Dominion University, & Chicago-Kent College of Law

Following are transition guidelines for outgoing student organization officers to help ease the transition as the newly elected officers take over from the previous officers. Through this transition, the incoming officers will be able to learn from the experience of the previous officers and offer continuity and continued growth for the organization. This information can be passed down through a meeting with the incoming and outgoing officers. It would also be helpful to include this information in a binder for the student organization.

Topic areas to cover

Review the group's goals for the previous year

- D What did we hope to accomplish?
- D How well did we do on each goal?
- D Which goals should be continued?
- D Which goals should be altered?
- D Which goals should be dropped?

Review programs and activities.

- D What activities and programs did we sponsor?
- D How effective was each program?
- D Did we have a good balance of different kinds of programs?
- D Did we do any community service activities?
- D Were the programs and activities consistent with group goals?
- D Which activities should be continued and which should be dropped?

Review membership.

- D Do we currently have just enough, too few, or too many members (in light of the group's goals)?
- D How effective were our membership recruitment efforts, if any?
- D Are the members actively involved in the operation of the club (including decision making, planning, implementing, and evaluating)?
- D Are members enthusiastic about the activities and motivated to work towards the group goals?
- D Were there adequate opportunities for members to get involved?

Review officers and organizational structure.

- D Do officers understand their responsibilities and roles within the organizational structure?
- D Did the officers operate as a team or could cooperation between officers be improved?
- D Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?
- D How would the general membership evaluate the effectiveness of the officers?
- D How would the officers evaluate the effectiveness of the officers? What could be improved?

Make sure the incoming officer has a copy of the following items:

- D Copy of Constitution and By-laws
- D Position description of officers and members
- D List of committees and their description
- D Member & officer contact list
- D Contact information of important people/offices on campus
- D List of basic annual procedures and/or calendar of annual events
- D Web page and webmaster information. How do you maintain the site?
- D Mission, philosophy, goals and/or purpose statement of organization
- D Financial records
- D Evaluations of previous and current projects
- D Meeting minutes and agendas
- D Any historical records of the organization

Review organizational operation.

- D Was the budget managed properly?
- D Were meetings run effectively?
- D Was the frequency of meetings appropriate?
- D Do we have a committee structure? If so, is it working? If not, is it needed?
- D Do we experience scheduling conflicts with other groups or activities?

Next Steps

- D Work together to make a list of “things to do” for the incoming officer.
- D Which items need their attention now?
- D Make this list together so the outgoing officer can help with direction.
- D Make sure to trade contact information so that the outgoing officer can be a resource in the year ahead!

Additional information to include

What are the major strengths of our organization?

What are the major weaknesses?

What is the best advice we, as outgoing officers, can give to the new officers?

Have the new officers meet individually with their predecessor and discuss the following:

- D Responsibilities of the position
- D Timetable for completing duties of the position
- D Unfinished projects
- D Important resources and contact persons
- D Mistakes that you made that could have been avoided
- D Advice the outgoing officer wishes he/she had been told before assuming the office last year
- D Any questions the new officer may have for the outgoing officer
- D Where the outgoing officer can be reached in the future (in case more questions arise)

Outgoing Officer To Do List

- D Organize all notebooks and files
- D Finish all necessary correspondence (letters, e-mail, phone calls)
- D Prepare year-end report and evaluation
- D Develop action plan and time-line for new officer transition

Outgoing Officer Questions

What are the current strengths and weaknesses of the group?

What is the best advice you can give your successor?

What were there major challenges and accomplishments in your term?

Incoming Officer To Do List

Incoming Officer Questions

What made you want to run for this office? Why? List three reasons:

List three new ideas you would like to implement this year:

Can you foresee any problems during your term of leadership? What solutions can you suggest?

Who would you go to if you had concerns about members of the board? An event?

What goals or events from last year would you like to continue? How can you improve them?

What specific kinds of materials do you think you need to have transferred to you?

Questions to ask outgoing officers
Things I should do over the summer

People (positions) that I should get to know

Services that I need to know about

Other questions I want answered

Student Organization Transition Document

Goals

What did we hope to accomplish?

How well did we do on each goal?

Which goals should be continued?

Which goals should be altered?

Which goals should be dropped?

Programs and Activities

What activities and programs did we sponsor?

How effective was each program?

Did we have a good balance of different kinds of programs?

Did we do any community service activities?

Were the programs and activities consistent with group goals?

Which activities should be continued and which should be dropped?

Membership

Do we currently have just enough, too few, or too many members (in light of the group's goals)?

How effective were our membership recruitment efforts, if any?

Are the members actively involved in the operation of the club (including decision making, planning, implementing, and evaluating)?

Are members enthusiastic about the activities and motivated to work towards the group goals?

Were there adequate opportunities for members to get involved?

Officers and Organizational Structure.

Do officers understand their responsibilities and roles within the organizational structure?

Did the officers operate as a team or could cooperation between officers be improved?

Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?

How would the general membership evaluate the effectiveness of the officers?

How would the officers evaluate the effectiveness of the officers? What could be improved?

Organizational Operation

Was the budget managed properly?

Were meetings run effectively?

Was the frequency of meetings appropriate?

Do we have a committee structure? If so, is it working? If not, is it needed?

Do we experience scheduling conflicts with other groups or activities?

Member & officer contact list

Organization Information

Please complete only that which is applicable.

Organization E-mail: _____

Organization Web Site: _____

Number of Current Members: _____

Date of Next Elections: _____

Primary Contact Person: _____

Title: _____

Street Address: _____

City/State/ZIP: _____

Phone Number: _____

E-mail Address: _____

Officers

If you have additional officers, please attach a list to this form.

Name: _____

Name: _____

Title: _____

Title: _____

E-mail Address: _____

E-mail Address: _____

Name: _____

Name: _____

Title: _____

Title: _____

E-mail Address: _____

E-mail Address: _____

Name: _____

Name: _____

Title: _____

Title: _____

E-mail Address: _____

E-mail Address: _____

Members

