

# Incoming Officer Transition Packet

## Transition Overview

An officer transition is a period of time between the selection of new officers and the point at which new officers assume their new role within the organization. Many benefits accompany a successful officer transition. As an incoming officer, take time to consider how the transmission of information and detailed conversations with the outgoing officer contributes to the success of the organization. Transitions provide an opportunity to pass on knowledge and wisdom to future leaders; future leaders gain personal accounts of previous leaders' successes and challenges. The transition process is a reminder of the mission, vision, and values of the organization as well as an assessment opportunity to assess previous programs, events, areas of organizational strengths and challenges.

The following are key points of an effective officer transition:

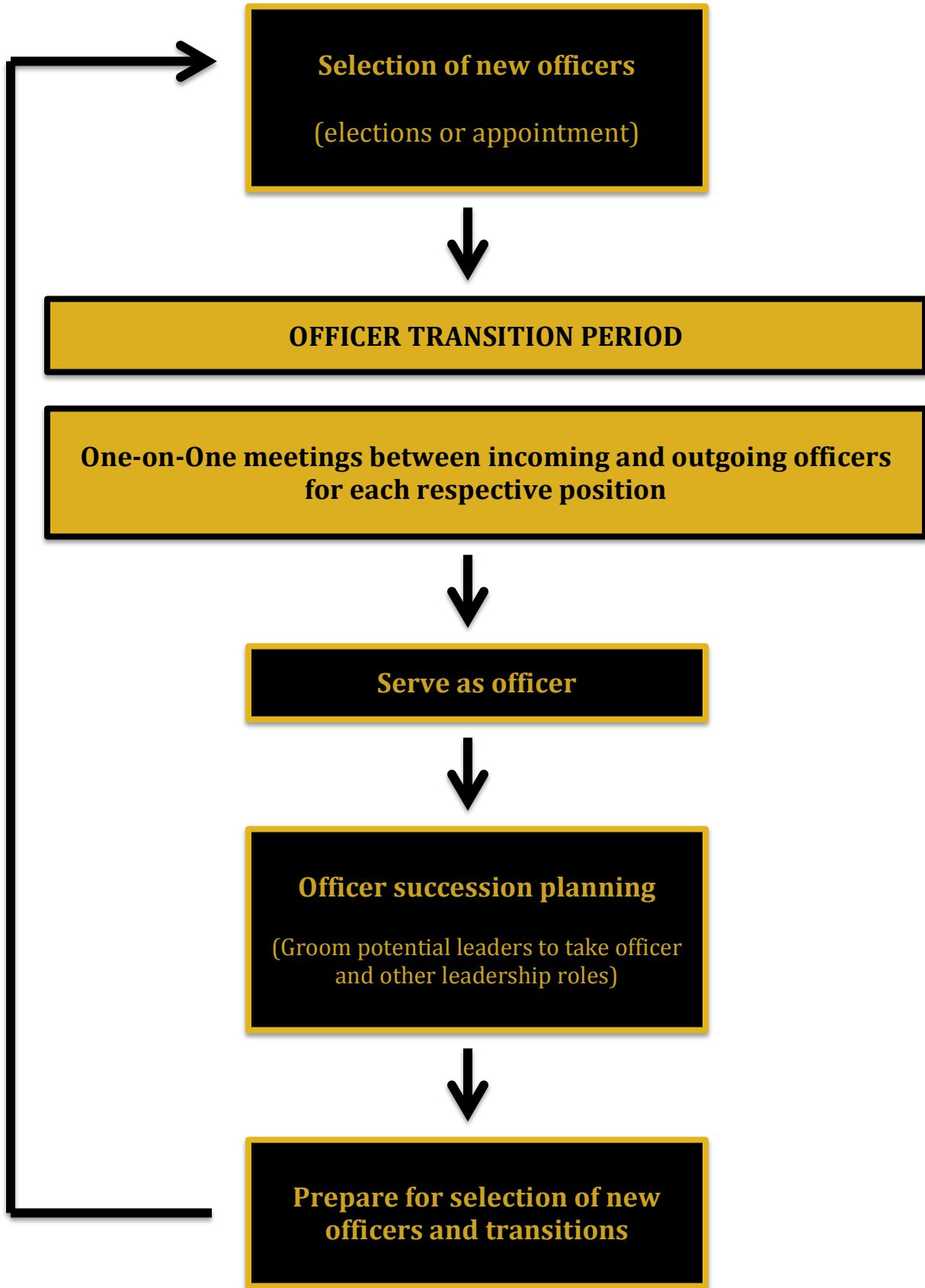
- Maintains effective continuity of the group's progress, goals and growth
- Helps ensure the successful transfer of important information
- Helps build upon the achievements of the organization this year
- Reinforces positive/productive communication between officers and between the officers and the group
- Provides an opportunity for incoming officers to plan for the future and establish new goals
- Creates an atmosphere where leaders learn to work together effectively

The following pages provide thoughtful conversation topics and questions to direct you through the transition process. To better understand the importance of transitions, the following is a big picture overview of the officer transition process.

*\*Preparing for officer transitions is a yearlong process, as officers must document important information and records consistently.*

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## Incoming Officer Transition Checklist

To assure an effective officer transition takes place, as the incoming officer, complete the following checklist thoroughly.

- Review the group constitution, bylaws, and standing rules that apply to your position
- Review the *Important Information to Transition* document
- Complete the *Incoming Officer Questionnaire*
- Schedule one-on-one meetings with the outgoing officer(s)
- Read the information, documents, and notebooks provided by outgoing officer(s)
- Browse the Student Org Handbook (<http://wp.stolaf.edu/sa/handbook/>) and Responsibilities and Privileges page (<http://wp.stolaf.edu/sa/student-org-privileges-responsibilities/>)
- Review the completed *Outgoing Officer Questionnaire* with the outgoing officer (found in the *Outgoing Officer Transition Packet*)
- Review the completed *Outgoing Officer Goals Worksheet* with the outgoing officer (found in the *Outgoing Officer Transition Packet*)
- Meet with the organization advisor and the Student Activities staff
- Attend the Student Organization and Financial Training in the fall

## Incoming & Outgoing Officer One-on-One Meetings

The following will help guide your conversation by focusing on past accomplishments and providing a critical evaluation of the past year in office.

### **Agenda**

- Responsibilities of the position
- Review *Outgoing Officer Questionnaire*
- Transition of the officer information and documents to the incoming officer (see *Information to Transition* document)
- Timeline for completing duties of the position
- Review of the *Outgoing Officer Goals Worksheet*
- Unfinished projects
- Opportunities for improvement
- Important resources and contacts
- Mistakes the outgoing officer(s) made that could have been avoided
- Review *Incoming Officer Questionnaire*
- Outgoing officer(s) contact information (in case more questions arise)

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## Important Information to Transition

Groups should transition documentation and important information to incoming officers. It is recommended the following items be kept electronically through Google Drive connected to your group-specific\* Gmail account or Shared Drive. Outgoing officers should identify who is responsible for transitioning the following materials.

\*Remember that Google docs connected to an individuals account delete when their account is deactivated upon graduation.

- ◇ Your group's history (include photos, if applicable)
- ◇ Yearly Review (including, membership review, financial overview, program reports, etc.)
- ◇ Constitution/Bylaws (including mission and/or purpose statement and officer responsibilities)
- ◇ Student group organizational structure (officers, committees, etc) and roles and responsibilities
- ◇ Group information (i.e. passwords to social media, web pages, details about storage, etc.)
- ◇ How to: Use Lawson, make room reservations, Fund requests, fill out financial/contract paperwork, making purchases
- ◇ Calendar with all-important dates. Google Calendar is a great resource for passing on these dates
- ◇ Event planning documents from past events
- ◇ Debrief notes from events, meetings, etc.
- ◇ Financial Information (Budgets, receipts/invoices, etc.)
- ◇ Meeting agendas/minutes
- ◇ Marketing and promotion materials (for example, logo, posters/advertisements)
- ◇ Important contact information and correspondence (contact information for officers, advisors, departments, organizational partners, vendors, etc.)
- ◇ Current reservations or agreement documentation
- ◇ Spoken agreements with partners or vendors for the future
- ◇ Goals for the year and progress: where does the org see itself progressing within the next year? Make sure the goals are SMART (Specific, Measurable, Attainable, Realistic, and Timely)

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## Incoming Officer Questionnaire

*Bring this completed form to your one-on-one meetings with the outgoing officer(s).*

1. What position-specific things do you want to know about (i.e., reports, timelines, duties, etc.)?
2. What are you looking forward to most about your position?
3. What do you consider to be the greatest responsibility of your office?
4. What skills will you need to be a successful leader in this role and how will you develop those skills?
5. What are your expectations of yourself in this position?
6. What expectations do you have for the rest of the group leaders and members?
7. What expectations do you believe others have of you?

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8. What resources and services do you need to know more about?
  
  
  
  
  
  
  
  
  
  
10. What are your immediate priorities and what action items/goals can wait until later in your term?
  
  
  
  
  
  
  
  
  
  
11. What other questions do you want answered as you begin your role?

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# Incoming Officer Goals Worksheet

The purpose of the *Goals Worksheet* is to develop goals specific for your role. It is important to review the following goals with your organization.

Goal	Action Plan for Completion	Completion date	Resources Needed	Potential Barriers

