# Officer Transition Guide

## Overview

The purpose of this guide is to give your organization a few strategies in order to implement a smooth officer transition from one year to the next.

## Why Transition?

Tired of reinventing the wheel? Often times organizations spend little time in the transition stage and consequently new officers spend too much of their time acclimating to their newly-elected position. A smooth officer transition will not only improve the abilities of newly-elected officers, it will decrease the amount of time each officer spends "learning" his position. Through an effective 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.

The transition of leadership for your organization is the single most important event in a viable student organization's year. It can be smooth or a complete disaster, and may determine the effectiveness of the group for years to come.

## Officer Binders

It is important to document and keep track of everything your organization did for the past year. Organize all information you used this year in a way that an upcoming officer would understand. The most effective way to do this is to compile documents in the binder as things happen, and not at the end of your term. Make sure the binder is an expectation of each officer. An officer notebook generally should contain the following information:

- The corresponding officer manual for the position
- Copy of the organization's constitution & bylaws
- Copy of officer responsibilities as stated in the constitution & bylaws
- All current forms relative to the office
- Record of activities over the past year
- Calendar of the past year
- Recommendations for the coming year
- Resources relevant to the office
- Other pertinent "campus" information
- A letter to the next officer.

The following is a more specific example of additional information that should be included for an officer notebook for an Event Chair:

- Event plans-with descriptions of events
- Budgets for each event
- Calendar of events
- Maps
- Volunteer sheets and schedules
- Schedule of each event
- List of contacts (Scheduling, Facilities, Student Activities, etc.)
- Contracts

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At the end of each term, officers should update and revise the information in their notebook and pass along the notebook to the next incoming officer. If done correctly the Office Notebook can provide serious longevity to the position.

## Officer Shadowing

New officers can shadow outgoing officers in order to understand what to do for the next year. Outgoing officers should cover the following topics (and other topics specific to your organization) with incoming officers:

- Purpose of the position and vision for the position in the future (or upcoming year)
- Review of the past year: Likes, dislikes, successes, and improvements
- Things you wish you knew in your position
- Binder of your position with all documents (schedule of events, budgets, contacts, etc.)
- Words of encouragement!

## Outgoing & Incoming Officer Meeting

Conduct a meeting to review the year, and discuss ways to improve the organization and events for next year.

- Review goals from the past year to see if they were met, and discuss how to meet them the next year if goals were not met.
- Write a list of expectations for each incoming officer, and discuss them.
- Evaluate programs, meetings, and other events, and think of ways to improve them.

## OrgSync

Log into your organization portal and browse the files previous officers have uploaded to the portal.

Uploading files onto OrgSync in addition to creating officer binders will give the new officers an electronic copy that will always be available.

## Officer Transition Checklist

The purpose of this section is to provide a structured list of things to do before and after officer elections.

**Before Officer Elections**

- ☐ Review officer descriptions and make sure they accurately reflect officer responsibilities and organization needs.
- ☐ Determine nomination time, location, and procedures, and communication that information to organization members.
- ☐ Develop a list expectations for each outgoing officer to complete by the end of the term (i.e. finalize officer binders, upload documents to OrgSync, train new officer, etc.)
- ☐ Review constitution and by-laws and make necessary changes. If any changes are made, submit updates in OrgSync.
- ☐ Create a list of accomplishments and submit to the new officers.

☐   Have all necessary documents ready for officer elections

**After Officer Elections**

☐   Update OrgSync with new officer changes, and have organization profile ready to submit for registration.
☐   Notify advisor(s), and if applicable, national organizations, departments, and governing councils of new officers.
☐   Set up a retreat or officer transition meeting where you will:

- Discuss officer responsibilities
- Set new goals and expectations
- Review OrgSync organization profile
- Pass down passwords, documents, and organization bank account info
- Evaluate the organization budget
- Review organization constitution and by-laws
- Develop methods for organization recruitment and member retention

☐   Set up officer shadowing/individual training meetings between outgoing and incoming officers. Discuss the following:
- Things you would have done differently
- Successes and things to improve in the position
- Pass down the officer binder
- Answer additional questions the new officer may have about the position

☐   Register student organization with Student Activities Center via OrgSync and attend RSO orientation
☐   Reserve organization meeting locations and times by submitting an Event Application in OrgSync. To access it, visit your organization's portal and click on the header "Events" and then the green button "Create an Event" to get started. You can do this only if you have been given appropriate portal permissions.
☐   Develop an organization calendar of events and ensure it matches your events listed in OrgSync.

*Adapted from University of Central Florida, Student Organization Officer Transition Checklist.*