

# Officer Transition

The leadership transition for your organization is very important and sets the tone for the year. Sometimes transitions are rough and other times they couldn't have been better. Here are a few ideas and hints in making sure your leadership transition is as smooth as it can be, including lots of questions the old officers should discuss with the new offices.

**Set up a meeting –**

Don't just drop off a binder and leave a note that says, "Good luck!" Make sure that the outgoing and incoming officers meet together for as long as it takes to go over everything and answer any questions that may arise.

**Review the calendar from the previous year –**

- What does the new leadership need to start planning right away?
- When do traditional programs fall?
- When should the new leadership anticipate being the busiest?
- If you could go back and put things on the calendar differently would you?

**Review budget and funding –**

- What is the financial standing of the organization?
- Where did the organization get funds from last year?
- Which fundraisers worked? Which didn't?

**Review past and present events –**

- What events is the organization known for?
- How long does it take to plan the events and when should the planning start?
- What events worked and what events need to be improved if you want to do them again?
- Would you change anything about the events from the previous year?

**Share files that are related to the position**

- Copy of constitution and by-laws
- Position description of officers and members
- List of committees and their descriptions
- Member and officer contact list
- Contact information of important people/offices on campus
- List of basic annual procedures and/or calendar of annual events
- Mission, philosophy, goals and/or purpose statement of organization
- Financial records
- Evaluations of previous and current projects
- Meeting minutes and agendas
- Any historical records of the organization

**Make introductions to resources –**

Schedule a time to walk around campus with the new leadership to introduce them to physical space and also people they may be interacting with on a regular basis.

**Meetings and organization –**

- Where were meetings held and how do you reserve that space?
- What are the weekly responsibilities for your position?
- What were the most and least challenging aspects of your position?

Adapted from Adrian College

[http://www.adrian.edu/student\\_life/student\\_organizations/resource\\_documents/officer\\_transition.pdf](http://www.adrian.edu/student_life/student_organizations/resource_documents/officer_transition.pdf)  
 and from the University of Kansas

[http://www.silc.ku.edu/leaderbits/officer\\_transition.pdf](http://www.silc.ku.edu/leaderbits/officer_transition.pdf)