

Student Organization Transition Plan

Outgoing Officer Transition Outline

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 continued 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 difficulties of the previous year. The following outline can help you make your transition meeting as smoothly as possible.

I. Welcome and Introductions

- Help participants get acquainted and explain the purpose of the meeting

II. The Year in Review

- Goals: Review the group’s goals for the previous year.
 - i. What did we hope to accomplish? How well did we do on each goal?
 - ii. Which goals should be carried on this year? Which goals need to be changed?
 - iii. Which goals are no longer feasible?
- Programs and Activities: Evaluate what your group did.
 - i. How effective were the programs / activities we sponsored?
 - ii. Did we have a good balance in our schedule of programs and activities?
 - iii. Were our programs and activities consistent with our goals?
 - iv. Which activities and programs do we want to repeat?
- Membership: Evaluate number of members and their commitment.
 - i. Do we have too many, too few, or just the right amount of members? Were our recruitment efforts successful?
 - ii. Are our members as actively involved as we want them to be?
 - iii. Were the chances for members to get involved in a meaningful way?
- Officers and Organizational Structure: Evaluate officers and structure.
 - i. Are officer roles and responsibilities clearly described?
 - ii. Did officers work as a team, or is there more teamwork needed?
 - iii. Is the time and effort required in each office comparable?
 - iv. Is there two-way communication between officers and members?
 - v. How do the members feel about the officers?
- Organizational Operations: Evaluate finances, communication, etc.
 - i. Were the finances adequate for our group, and managed properly?
 - ii. Were meetings run effectively? Was their frequency adequate?
 - iii. Did the committee structure work?
 - iv. Did we have scheduling conflicts with other groups or activities?
- Faculty Involvement: Evaluate both quality and quantity. Did our advisor provide the support we needed?
 - i. Did we give our advisors and other faculty a chance to get involved?
 - ii. How could we improve faculty involvement?

- Public Image: Evaluate how other groups perceive you.
 - i. How do we see ourselves? Is this how “outsiders” see us?
 - ii. How can we enhance our image?
- III. Your Legacy to the New Officer Team
- 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?
- I. Officer Transition
- Have the new and outgoing officers meet individually to discuss:
 - i. Responsibilities of the position, with a job description if possible.
 - ii. A timetable for completion of annual duties.
 - iii. Unfinished projects.
 - iv. Important contacts and resource persons.
 - v. Mistakes that could have been avoided.
 - vi. Advice for the new officer.
 - vii. Any questions the new officer may have.
 - viii. Where the outgoing officer can be reached with future questions.
- II. Wrap-Up
- “Pass the gavel” in a semi-official ceremony and wish everyone good luck! Provide an opportunity for informal socializing.

Outgoing Officer To Do List

1. Organize all notebooks and files (hard copies and electronic)
 - a. Create a guide for your position
2. Finish all necessary correspondence (letters, e-mail, phone calls)
3. Prepare year-end report and evaluation
4. Develop action plan and timeline for new officer transition
 - a. Including but not limited to:
 - i. Necessary meetings attended and conducted by officer
 - 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 Sheet(s)
6. Prepare / Update Officer Handbook

Outgoing Officer Worksheet

[To be completed before transition meetings]

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 which assisted me in handling my job were...
7. Things I wish I'd known before I took the job were...