UWM Student Involvement Presents:

Passing the Torch

Planning Transition for Student Organization Officers

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What is Transition?

Officer transition is the **amount of time and energy** an organization invests in preparing for new officers.

**Purposeful transition planning** emphasizes not having to start over every year and ensuring positive change.
Planning Positive Transitions is:

- A transfer of knowledge and skills
- A time for new leadership to learn from outgoing officers
- An opportunity to evaluate and reflect on the organization and the officer role
- An orientation and goal setting process
- The responsibility of both incoming and outgoing officers
Transition Planning Starts Early

As with most plans, starting early is best. Most officers will know when they are leaving their roles in advance. Take advantage of that time by:

- Identifying emerging leaders
- Encourage those potential officers by building a relationship with them
- Help potential officers develop the skills and tools they will need to lead
Steps in Transition

Knowing what transition is and when it starts is just the first step. Next you will:

- Evaluate the organization and officer roles
- Set S.M.A.R.T. Goals
- Transfer information
- Celebrate
Evaluating the Organization and Officer Roles

Using the Start, Stop, Stay, Shift Activity
Evaluate the organization and officer roles through the 4 S’s:

For each 'S' below, brainstorm ideas of what fits each category. By doing so you evaluate the org and the officer role

**Stop:** These are activities or actions that are no longer useful or do not help in reaching goals.

**Start:** These are activities or actions that are not currently done within the organization or officer role, but could help reach goals.

**Stay:** These are the things that are working and will continue to be done.

**Shift:** These are activities and actions that are not quite working out, but still have potential value. Ripe for tweaking.
Setting S.M.A.R.T. Goals

After evaluation, set goals using the S.M.A.R.T. goals standard below. With these goals you’ll be prepared to take the next transition steps.

- **Specific:** Are your transition goals clear and concise?
- **Measurable:** Gives feedback and lets one know when the goal is complete. How will you know progress is being made?
- **Assignable:** Goals must be assignable to individuals or groups. Who does what? What are the barriers?
- **Relevant:** The goal will achieve the effect you intend it to have.
- **Time-Bound:** The goal can be accomplished in a reasonable amount of time.
Transferring Information

Knowing what needs to be shared and how it will be shared
Transferring Information as Filling a Toolbox

Think of information as the tools needed to be a good officer. Fill your ‘toolbox’ with what you think you will need or the next officer will need.
Your Toolbox Should Include:

- Officer manual or position description
- Constitution/Bylaws
- Budget/Financial records
- Keys and passwords
- Contact information
- Past goals/strategic plans
- University policies and procedures
- Calendar
- Any other important files or documents
Meet One-on-One and as a Group

One On One:
Set a meeting with your counterpart officer (incoming/outgoing). Be ready to ask for or give the contents of your toolbox. Also prepare some questions such as:

1. Who are the top 5 people that this officer position needs to know?
2. What went well? What should the group/officer continue doing?
3. What problems or stumbling blocks did you encounter? How did you handle them?
4. What projects would you have liked to do if you had the time?
5. What would you have done differently if you had the opportunity?
6. How did you stay organized?
7. Is there any unfinished business that the new officer needs to address? Any summer tasks?
8. What advice do you have?
Meet One-on-One and as a Group

As a Group:

Meet with the whole group to discuss officer changes. Allow time for introductions of new officers and a Q&A session.

Address any concerns that come up and make it a goal of the meeting to have everyone on the same page for what is coming in the future. Consider using the 4 S's activity to get input from everyone.
Celebrate!

Acknowledge outgoing officers and celebrate the end of a productive semester or year.
Celebrate!

Celebration time is more than appropriate when endings are near and changes are ahead.

Gather your members, thank outgoing officers for their service, acknowledge the group's accomplishments, and recognize outstanding members.
Student Involvement Resources

For more tools and resources on officer transition and other topics visit the Student Involvement Website:
uwm.edu/studentinvolvement

OR

Visit PantherSync and check out the resources in the 'Files' section under 'All Student Organization Resources'