

## Officer Transition

◆ **O n e** of the most important functions of an advisor is to assist in the transition from one set of organization officers to the next. As the stability of the organization, the advisor has seen changes, knows what works and can help maintain continuity. Investing time in a good officer transition early on will mean less time spent throughout the year nursing new officers through the quarter.

The key to a successful transition is making sure new officers know their jobs **BEFORE** they take office. Expectations should be clearly defined. There are a number of ways to conduct the officer transition. The following examples demonstrate two commonly used methods.

### **The Team Effort**

The team effort involves the outgoing-officer board, the advisor, and the incoming-officer board. This method involves a retreat or series of meetings where outgoing officers work with incoming officers on:

1. Past records/notebooks for their office and updating those together
2. Discussion topics should include:
  - Completed projects for the past year.
  - Upcoming/incomplete projects.
  - Challenges and setbacks.
  - Anything the new officers need to know to do their job effectively. The advisor's role may be to:
    - ◆ Facilitate discussion and be a sounding board for ideas.
    - ◆ Organize and provide the structure of a retreat.
    - ◆ Offer suggestions on various questions.
    - ◆ Refrain from telling new officers what they should do.
    - ◆ Fill in the blanks." If an outgoing officer doesn't know how something was done, or doesn't have records to pass on to the new officer, you can help that officer by providing the information he or she doesn't have.

The structure of a team effort retreat can take many forms. The advisor's role in this process is to provide historical background when needed, help keep goals specific, attainable and measurable and provide advice on policies and procedures.

### **One-on-One Training, Advisor with Officers**

While it is ideal to have the outgoing officer team assist in training the incoming officers, often it is left up to the advisor to educate the incoming officers. In that situation, there should be a joint meeting of the new officers, as described in section 4 of the above outline. After that meeting, the advisor should meet individually with each officer; examine the notebook of the previous officer (or create a new one).

Things to include in a new notebook:

1. Any forms the officers may need to use
  2. Copies of previous meeting agendas
- A copy of the organization's constitution and bylaws

Talk about what the officers hope to accomplish in the forthcoming year. Assess the officer's role in the organization. What are the expectations of each position? What are the student's expectations of the position and his/her goals?

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