

As the semester draws to a close and you begin to think about the year ahead, your organization may be holding elections and preparing to transfer responsibilities to a new group of officers. The time and energy that both outgoing and incoming officers dedicate to an adequate transition of officers during these last few weeks will play a key factor in the future success and longevity of the organizations. Prior to the election and transitions occur, be sure to ask yourself and plan for these questions:

Why transition?

- Provides for transfer of significant knowledge about the organization
- Minimizes the confusion of leadership changeover
- Utilizes the valuable contributions of experienced leaders
- Increases knowledge and confidence of new leaders
- Minimizes the loss of momentum and accomplishments for the group. Why “re-invent the wheel”?

When do we start transitioning officer teams?

Transition should occur all year!

- Begin early in the year to identify emerging leaders to give them experience and exposure to resources
- Encourage potential leaders by building a relationship with them. Help them to develop skills, delegate responsibility to them, share with them the personal benefits of leadership, clarify job responsibilities, let them know that transition will be orderly and thorough, and last, model an open, encouraging leadership team
- Establish a calendar for the year to provide a general timeline for new officers of what the year looked like before

What is a smooth transition?

- The responsibility of both the outgoing and incoming officers
- A way to avoid starting over from scratch each year
- A transfer of significant organizational knowledge
- A sense of closure for the outgoing members
- A time for new leadership to absorb the experience of the outgoing members
- An opportunity to evaluate and reflect on the past year
- An orientation and goal setting process

What can I do to prepare for transition as an incoming or outgoing officer?

Pass on or obtain materials. Outgoing officers should prepare materials to pass on and incoming officers should ask to receive information before the end of the semester. Here are some examples of things to pass on:

- Officer manual and position description
- Constitution/bylaws and any other governing documents
- University policies and procedures
- Budget and financial records
- Grant applications and funding
- Checkbook/ledger (if you have financial responsibilities)
- Keys and/or passwords
- Organization/team equipment
- Contact list

- Past goals/strategic plan
- Calendar
- Past meeting minutes
- A report on any major events, including the planning timeline
- Any other important files or documents

Go Green. Rather than printing documents and compiling into a binder, you can make use of many other electronic resources for file sharing. Pass everything over via a flash drive, or utilizing online tools such as Dropbox, or Google Docs. PantherSync also allows for sharing documents within an organization through its online folder feature. If your organization gets in the habit of posting shared files regularly, it will save time down the road.

Meet one-on-one. Set aside at least an hour to meet face-to-face with the other incoming/outgoing officer for your position. This is the opportunity to transfer important knowledge and to share insight regarding any goals or major areas of need for the upcoming semester/year.

Utilize the following questions as a guide for your conversation:

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 as a group. It is up to the group to determine how much time to set aside for a group transition. Group officer transition can be done in a meeting, workshop or retreat format. It can be as formal or informal as you want it to be. The important thing is to provide the opportunity for incoming and outgoing officers to get together for a discussion together and identify organization needs and goals. Get a date on the calendar soon, as it is a busy time of year.

Recognize the work that has been done and set goals for the future. Be proud of the accomplishments made throughout the year. Use these accomplishments to build on and set organizational and position-specific goals. Consider both current organizational needs as well as what you hope the organization will look like in the future. Do you hope to grow a certain program or event? Do you want to increase the group's membership? Develop three goals which you will focus on over the course of your officer term to take the group closer to its ideal. Use those as a guide for action planning in the fall.

Consider training needs and opportunities. Are there skills that the incoming officers will need to develop in order to be successful in their positions? Are there resources with which they will need to become more familiar? The Student Involvement staff are happy to get you connected to the resources you need.

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WHAT DO YOU WANT TO DO TODAY?

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