UWM STUDENT UNION
Student Involvement

Union 355 • 414.229.5780 • activities@uwm.edu • union.uwm.edu • involvement.uwm.edu

Officer Transition

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.

When do we start transitioning officer teams?

Transition planning 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

Building an Officer Transition Toolbox:
As an outgoing officer, what can I do to prepare for the transition?

Prepare the right materials. Organize the following items for the incoming officer. If any are items that you do not currently have, consider which need to be created. Focus on sharing files that will help them learn their position and avoid duplicating work that has already been done. There may be some things that you can eliminate.

- Officer manual and position description
- Constitution/bylaws and any other governing documents
- University policies and procedures
- Budget and financial records – make sure to include information on any grant applications
- 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 officer who will be taking over your responsibilities. Do not just pass on a binder. Make the time for them. This is your opportunity to transfer important knowledge and to share your insight regarding any goals or major areas of need for the upcoming semester/year. It is also their opportunity to get their questions answered from the expert – You!

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?

UWM | STUDENT UNION
Student Involvement

Union 355 • 414.229.5780 • activities@uwm.edu • union.uwm.edu • involvement.uwm.edu

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. Some tools that you can utilize to facilitate this process include an Annual Checklist/Timeline, Stop-Start-Stay-Shift Plan, and SMART Goal Setting. Get a date on the calendar soon, as it is a busy time of year.

Recognize the work you have done. Be proud of the time and energy that you have dedicated to advancing your organization. Now it is time to assist a new batch of leaders in doing the same.

Stay in Touch and Follow-Up. Even after you've graduated or moved on from your organization, be open to staying in touch with new officers and serve as a mentor. Consider setting a date in the future on your laptop, tablet or smartphone to remind you to check in.

Filling Your Transition Toolbox:

As an incoming officer, what actions can I take to help the organization transition smoothly into the new year?

Obtain important materials. Hopefully the outgoing officer has put together a file (electronic or paper) of all of the materials that you will need for the upcoming year. A suggested list is offered below. If you don't receive these items, you will want to check in with others in the group to make sure you have them before the year ends. If there are any that you do not receive, this is a great opportunity to begin creating the files you need to set your organization up for success.

- Officer manual and position description
- Constitution/bylaws and any other governing documents
- University policies and procedures
- Budget and financial records
- Grant applications – make sure you know what funds your group applied for.
- 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

Meet one-on-one. Set aside at least an hour to meet face-to-face with the officer who previously held your responsibilities. Appreciate their role as the expert and consider their feedback and suggestions. Listen for things that are going well that you can avoid recreating from scratch, as well as key opportunities for areas that need development – those are the places where you can leave your legacy.

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 with your new group. Set aside at least an hour, if not a few, to begin planning ahead for fall. Make note of any responsibilities that officers will need to take care of during the summer months, and determine your summer communication plan. If your organization will be hosting meetings or events at the beginning of the semester, develop your event planning timeline, to ensure that you meet any deadlines that may fall during the summer. Make good use of the energy and excitement that you have at this time to get a jump start on planning.

Set organizational goals, as well as position-specific ones. 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 you or your fellow officers will need to develop in order to be successful in your position? Are there resources with which you will need to become more familiar? Student Involvement Staff are happy to get you connected to the resources that you need.

After transition follow-up and thank you. Keep an open line of communication with the outgoing officers. Even after they've left the organization they can help you continue to have a smooth transition. When outgoing officers have been helpful, let them know! Send them a thank you letter or email and let them know their help was appreciated.

UWM STUDENT UNION
Student Involvement

Union 355 • 414.229.5780 • activities@uwm.edu • union.uwm.edu • involvement.uwm.edu

OFFICER TRANSITION CHECKLIST
[Materials & Information to Pass On]

The following is a list of transition information that incoming and outgoing officers should work together on in order to transfer information and resources prior to next year. This list is not intended to be exhaustive—please add organization-specific information and resources to better tailor to your group's needs.
(Adapted from University of Texas Arlington: http://www.uta.edu/studentactivities/organizations/handbook.php)

History
□ A copy of the charter, by-laws & any policies/procedures
□ Purpose/mission statement
□ Membership lists (current members & alumni)
□ Photos/scrapbooks/historical materials
□ Goals and objectives from last year
□ Organizational culture: strengths & weaknesses
□ Organizational chart & position descriptions

Year-End Review
□ Previous agendas & minutes
□ Calendar from past year
□ Program information from previous year
- Sample posters/flyers
- Press releases
- Planning documents
- Contracts, invoices

□ Status report for ongoing programs (room reservations…)
□ Any unfinished business
□ Important e-mail or PantherSync correspondence

Finances
□ Account number
- Credit Union
- University (if grant-funded)

□ Account statements
□ Account access—transfer account signers
□ Checkbook and ledger
□ Current & future budgets
□ Outstanding debts
□ Grant applications & necessary action that new officers need to take to receive funding

Officer Transition

UWM STUDENT UNION
Student Involvement

Union 355 • 414.229.5780 • activities@uwm.edu • union.uwm.edu • involvement.uwm.edu

University Processes & Materials

□ Student Organization Office—pick up keys
□ Renew organization (before fall semester)

- **Update and renew organization's profile in PantherSync, including officer listings and contact information**
- **Have Officers and Advisor read contract terms online**
- **Print, sign and submit updated organization profile to Student Involvement by due date**

Roles & Responsibilities

□ Letter or interview from outgoing officer

- Advice
- Experiences
- What was improved upon this year
- Things to know when getting started
- Priorities

□ Officer job description (as outlined in by-laws, but includes notes from outgoing officer)

- "Big picture" and small details

□ Group dynamics/climate of the organization

Skill Building

□ Enroll in Student Involvement programs and workshops
□ Leadership
□ Meeting management
□ Time management

Resources

□ Officer Manual
□ Annual Checklist/Timeline
□ Supplies
□ Log/in access information to organization email address and social media accounts
□ Membership application (if applicable)
□ University Policies and Procedures
□ Contact information

- Current members
- Advisor(s)
- National/international/local headquarters
- Alumni
- Center for Student Involvement Organization's Liaison
    - Tom Dake, Rick Clark or Kirstin DeMartino
- Student Association

□ University Resources (i.e. REPS, Union Marketing, Academic departments…)