

# Officer Transition Outline

*Adapted from Vicky  
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Officer transition is the single most important event in a viable student organization's year. Smooth and effective transitions will allow for a quick and effective start to the annual organizational cycle. We recommend that the transition period be marked by one of several formal "transition training" meetings.

The purpose of this resource is to give the incoming and outgoing officers of a student organization a format to be used to help ease the transition as the newly elected officers take over for the previous officers. It is recommended that a transition meeting be conducted before the new officers assume their positions and before the old officers leave the campus.

The meeting should last at least several hours, with a predetermined agenda and should include all officers and the faculty advisor. A casual, open atmosphere should be encouraged so that the organization can benefit from an honest evaluation of the group's accomplishments and problems of the previous year. Through this transition, the incoming officers will be able to learn from the experience of the previous officers and offer continuity and continued growth for the organization. It may be helpful to have the advisor actually conduct this session so that all officers can actively participate. Adaptations of this outline to meet the needs of the individual group are encouraged.

## Welcome and Introductions

(help the participants get acquainted)  
Explain the purpose of the meeting

## The Year in Review

*Goals*

### **Review the group's goals for the previous year**

- What did we hope to accomplish?
- How well did we do on each goal?
- Which goals should be continued?
- Which goals should be altered?
- Which goals should be dropped?

*Programs and  
Activities*

### **Evaluation of the group's activities and programs**

- What activities and programs did we sponsor?

- How effective was each program?
- Did we have a good balance of different kinds of programs?
- Did we do any community service activities?
- Were the programs and activities consistent with group goals?
- Which activities should be continued and which should be dropped

### *Membership*

#### **Evaluate the number of members and their level of involvement**

- Do we currently have just enough, too few or too many members (in light of the group's goals)?
- How effective were our membership recruitment efforts?
- Are the members actively involved in the operation of the club? (including decision making, planning, implementing, and evaluating.
- Are members enthusiastic about the group's activities and motivated to work towards the groups goals?
- Were there adequate opportunities for members to get involved in responsible and meaningful ways?

### *Officers and Organizational Structure*

#### **Evaluate the effective of the various offices and the structure of the organization**

- Do the officers understand their responsibilities and roles within the organizational structure?
- Did the officers operate as a team or could cooperation between officers be improved?
- Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?
- Are the officers "in tune" with the membership? It there two way communication? (and understanding of members' needs and talents.)
- How would the general membership evaluate the effectiveness of the officers?
- How would the officers evaluate the effectiveness of the officers? What could be improved?

### *Organizational Operation*

#### **Evaluate the finances, time, and manner of meeting, etc.**

- Were the finances adequate for the group's activities?
- Was the budget managed properly?
- Were meetings run effectively?
- Was the frequency of meetings appropriate?
- Do we have a committee structure? If yes, is it working? If no, is it needed?

- Do we experience scheduling conflicts with other groups or activities?

### *Faculty Involvement*

#### **Evaluate the quantity and quality of faculty participation in the organization and/or its activities**

- Was our faculty/staff advisor involved just enough, too much or too little?
- Were there adequate opportunities for faculty/staff to get involved in our organization? Did they get involved?
- Could faculty/staff involvement be improved? If yes, how?

### *Public Image*

#### **Evaluate how your group is perceived by the various segments of the public.**

- How is our group viewed by its membership?
- How is our group viewed by the students, faculty, and administration?
- How is our group viewed within the local community?
- What could be done to enhance our public image?

## **Your Legacy to Next Year's Group**

Currently, what are the major strengths of our organization?

What are the major weaknesses?

What is the best advice the outgoing officers can give to the new officers.

## **Officer Transition**

*Have the new officers met individually with their predecessor and discussed:*

- Responsibilities of the position
- Timetable for completing the duties of the position
- Unfinished projects
- Important resources and contact persons
- Mistakes that were made that could have been avoided
- Advice the outgoing officer wishes he/she had been told before assuming the office last year
- Any questions the new officer may have for the outgoing officer
- Where the outgoing officer can be reached in the future (in case more questions arise)

## Wrap Up

- "Pass the Gavel" and wish them luck
- Provide an opportunity for informal socializing (perhaps provide refreshments)

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