

Leadership Transitions

Good officer transitions are important to the continued operation and success of student organizations. It helps minimize confusion, gives outgoing officers a sense of closure, and provides incoming officers a foundation of knowledge. You should think of your transitions as a partnership between the incoming and outgoing officers.

Definition: An intentional process for a seamless transfer of organization responsibilities that builds emerging leaders, prepares incoming leaders, recognizes the work of outgoing leaders, and positions the organization for long-term success

Outgoing Officer Preparation:

Preparing to transition out of a position and bringing a new member into your role is a culminating moment for your Executive Board membership. As an Executive Officer, we know you want to leave a legacy for your student organization, and your legacy will continue with how well you transition this new member into the role you're vacating. Consider the following items as you prepare for the transition.

1. Keep ongoing records of happenings and changes during the year
 - a. Ex. Awards won, Meeting Minutes, Organization Calendar, etc....
2. Reflect on this last year, write a letter to your incoming officer
3. Update documents to include any changes from the year
 - a. Ex. Important Contact List, Organization's Constitution, Bylaws & Mission, etc....
4. Collect all things to pass down to the incoming officers
 - a. Ex. Tri-Fold boards, Organization Plaques, etc....
 - b. Do we have items in storage? Where is it? How does the new president get to it? Where would they get a key, if needed?
5. Revise Officer & Committee position descriptions to reflect current roles
6. Collect all the usernames and passwords for relevant accounts
7. Review yearly Calendar & add important events with descriptive feedback
8. Complete Outgoing Officer Reflection/Role Debrief:
 - During the year, I enjoyed this about my position the best...
 - The events we host are successful because...
 - The events we host can improve by...
 - The most important task I performed in my role was...
 - The person who helped me the most was...
9. Other items as applicable

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Important things to do during the transition:

- Schedule Officer Transition Meetings
- Complete Re-Registration Requirements
- Share advice with successor
- Share your soaccount password

Incoming Officer Preparation:

This information should be conveyed to the successor of the position.

- Review the position description
- Create a list of questions to ask during your meeting – really use this time to learn from your outgoing officer
- Create a list of things you want to do with this position and some ideas about how to get them done
- List out some of the potential resources you know of that will help you with this position
- Think about who else on the Executive Board will be an asset to your success in this position
- Contact the Advisor to introduce yourself and ask any relevant questions
- Complete the Incoming Officer Reflection:
 - My goals for this position are...
 - I think I'll be best at this part of this position...
 - I might struggle with this aspect of this position...
 - My biggest strength I'm bringing to this position is...
 - I hope I grow in this way...
 - I am so excited to work on this project...
 - The part of my life that most prepared me for this position is...
 - This position might help me get to this place in my professional life...
 - Is there something I should be asking...

Transition Meeting(s):

These meetings are dedicated to ensuring the transfer of information and advice from one officer to the next. Multiple meetings may be necessary.

- Go over job description in detail

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- Is anything missing from this job description?
- What was your main priority during the year?
- Ongoing projects
 - Give context - where you are in this process, what still needs to be completed and what is in the works right now?
- Share contact information of important people
 - Advisor
 - Other officers
 - People outside the university who are important for your org
 - University employees who help the most
- Develop Communication method between the officers
 - How will they reach you if they have an urgent question?
 - Who should they look to if they are confused?
- Review important systems
- Review financial standing of organization
- Answer questions
- Convey goals, suggestions, personal reflections
- Other items as applicable

Completing the Transition:

For the outgoing officer

- Once you've held a few meetings between the incoming and outgoing officers, you will need to rely on your communication plan
- If you have a shadowing period in place between incoming and outgoing, have a deadline for when that will end and be clear about that
- Once the deadline is upon you, you will enact your communication plan
- You will have handed off all the passwords, shared access to everything, etc...make sure that they have all the information they need to be successful
- Trust that you've done a good job and that they will be successful!

Adapted from The Ohio State University

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