Officer Transitions

Transitioning In
Why is it beneficial to transition in well?
- First impressions are important
- Sets the tone for the year
- Gather information so you don’t have to start from the beginning each year

Important Things to do to Transition in
- Get to know other members
- Build community, keep morale up/positivity, and show pride in organization
- Set goals for the organization and yourself individually to continually assess throughout the year
- Set expectations of the group to be aware of where the group is at and what they want
- Define your position – Everyone go over who is responsible for what
- Develop a relationship with your advisor – they can be a great resource!
- Make sure to get all necessary materials from outgoing officer before they leave

To Retreat or Not to Retreat?
- Retreats are great for big groups that need to build community, groups that may have meetings that are confusing for new members, to set goals for the year, etc.
- Retreats can be done off campus for a more extensive bonding experience, but can also be done inexpensively on campus! (bring some snacks, games, and some markers, pens, and paper for goal setting)

Transitioning Out (leave your legacy and help your organization progress!)

Transition Meeting – RULE OF 3
- 1\textsuperscript{st} Meeting: Exchange Binder & Explain Basics of what is included
- 2\textsuperscript{nd} Meeting: Answer Key Questions (See attached handout for ideas)
- 3\textsuperscript{rd} Meeting: Follow-Up – Answer their Questions!!

Things to Include in a Transition Binder
- Goals for you as an individual/ the organization
- Important Contacts / Resources List (Also, your contact information)
- Calendar (including dates of events / when the planning occurred) or Timetable
- Important Email / Correspondence
- Main Responsibilities
- Any projects (completed or not)
- Any Constitutions / Bylaws your organization may have
- Budget Information
- Important Forms / where to get these
- Agenda Meetings / Minutes
- Evaluations
- Disc of electronic copies of any/all documents
Officer’s Transition Worksheet

Please take time to fill out this worksheet and answer questions honestly and in as much depth as possible.

Are there any forms or duties specific to the position that I might not know about?

What should I do over the summer or first thing in the fall?

Who are people I should get to know and what positions do they hold?

Who is my advisor and should I know about anything about them?

What was your favorite part of the job? / What was your least favorite part?

What was the most difficult decision you made?

What would you have done differently if you could repeat this year?

What are some things you wish you would have known before you took the job?

Is there something you wish you would have done if you had more time?