

Student Organization Officer Transition Meeting Guide

(Ideally to be completed by outgoing and incoming officers/executive board members)

Before the newly-elected officers of your organization officially assume their responsibilities, it is helpful for the old and new officers to get together for a transition meeting. Such a transition meeting provides continuity and continued growth for the organization while allowing new officers to learn from the experiences of the outgoing officers. A casual, open atmosphere should be encouraged so the organization can benefit from an honest evaluation of the accomplishments and issues of the prior year.

The following outline can help make the transition meeting flow as smoothly as possible.

I. Welcome and Introductions

(Help participants get acquainted and explain the purpose of the meeting, consider hosting an icebreaker or “get-to-know you” activity)

II. The Year in Review

A. **Goals:** Review the group’s goals for the previous year. What did we hope to accomplish?

- a. How well did we accomplish each of our goals?
- b. What goals should we continue to focus on for next year? What goals need to be changed or altered? What goals are no longer feasible?

B. **Programs and Activities:** Evaluate the programs and events hosted by your group.

- a. How effective were the programs / activities we sponsored? How did we measure their effectiveness?
- b. Did we have a good balance in our schedule of programs and activities? Were our programs and activities consistent with our goals?
- c. What activities and programs do we want to repeat?

C. **Membership:** Evaluate the number of members and their commitment to your organization. Do you have too many, too few, or just the right amount of members? What actions did we take to recruit members? How can we improve recruitment efforts?

- a. Were our recruitment efforts successful?
- b. Are our members as actively involved as we want them to be?
- c. What were the opportunities for members to get involved in a meaningful way? How can we encourage members to get involved meaningfully?

D. **Officers and Organizational Structure:** Evaluate your org's officers and structure.

- a. Are officer roles and responsibilities clearly described?
How?
- b. Did officers work as a team, or is there more teamwork needed? What contributed to that teamwork dynamic?
- c. Is the time and effort required in each position comparable?
- d. Is there two-way communication between officers and members? How do the members feel about the officers?

E. **Organizational Operations:** Evaluate your org's finances, communication, etc.

- a. Were the finances adequate for our group and managed properly?
- b. Were meetings run effectively? Was their frequency adequate?
- c. Did the committee structure work? If not, why not?
- d. Did we have scheduling conflicts with other groups or activities? How can we reduce these conflicts?

F. **Advisor Involvement:** Evaluate both quality and quantity of advisor involvement.

- a. Did our advisor provide the support we needed?
- b. Did we give our advisors and other faculty a chance to get involved? How could we improve faculty and advisor involvement?

G. **Public Image:** Evaluate how other groups perceive you.

- a. How do we see ourselves? Is this how "outsiders" see us? How can we enhance our image?

H. Your Legacy to the New Officer Team

- a. What are the current strengths and weaknesses of the group?

- b. What is the best advice you can give your successor?

- c. What were three major challenges and accomplishments in your term?

I. Officer Transition

(Have the new and outgoing officers meet individually to discuss)

- a. Responsibilities of the position, with a job description
- b. A timetable for completion of annual duties
- c. Unfinished projects
- d. Important contacts and resource persons
- e. Mistakes that could have been avoided
- f. Advice for the new officer
- g. Any questions the new officer may have
- h. Where the outgoing officer can be reached with future questions

J. Wrap-Up

- a. "Pass the gavel" in a semi-official ceremony in front of the outgoing and incoming board and wish everyone luck in their new positions!

Provide an opportunity for informal socializing!