

Transitioning for Student Groups

Most successful student groups implement some type of an “officer transition process.” In order to be most effective, outgoing and incoming officers should try to have at least two weeks of overlap in their positions. This way, new officers have the opportunity to work closely with outgoing officers and to best understand the roles and responsibilities of their respective positions as well as best understand the intricacies and progress of the organization. The following information can assist student groups in creating a seamless and successful officer transition period.

Transition Purpose

- To help formalize the end of an officer’s term, and provide outgoing officers a sense of closure with an opportunity to reflect on their successes and think about the future of the organization.
- To pass on significant organizational knowledge and history.
- To prepare incoming officers for the responsibilities of their new positions.
- To prevent incoming officers from “reinventing the wheel.”
- To instill a sense of comfort and pride with incoming officers’ new positions.
- To introduce incoming officers to the advisor.
- To increase the confidence of the new leadership.

When and how do you prepare for transition? **EARLY AND OFTEN!**

It’s never too early to prepare for transition. Transition preparation can begin as early as your first day in office! Transition is an ongoing process that should be part of daily operations. As an event or initiative takes place, evaluation and preparation for the next time around should be happening.

Suggestions for Effective Transition

- **Meetings Between Officers:** Arrange a meeting with the outgoing/incoming officers and the advisor. Be sure to discuss past, current, and future issues so that the new leadership is prepared.
- **File sharing:** Create student group informational resource files for every important leadership position in the student group. The files should consist of the student group constitution, mission, goals, officer responsibilities, event planning information which may include to-do’s, checklists, evaluations, as well as important contacts from on and off campus. (See below for tips on using Portfolio to maintain group files.)
- **Goal Setting:** Create a reflection and goal setting meeting with the entire student group membership. Find out what direction they want to take the student group-then, meet as an executive board and establish goals and objectives for the student group. These goals and objectives should become part of the student group operations. See “Setting Group Direction” worksheet.
- **Financial Records:** Finances tend to be a big issue for student groups. In many cases, the budgeting process for one semester is generally prepared a semester earlier, when previous officers were in leadership. It is difficult for new officers to always understand why a specific amount was budgeted for an event or why a service was provided in the past, and for how much. Thankfully current and some past financial records for Student Union groups are available on the SU website.
- **Gathering Information:** Ask questions, initiate and build relationships with offices, and tour relevant spaces or offices to gain a broader understanding and perspective to better meet the goals of your student group.
- **Reports and Evaluations:** Written reports and/or evaluations are essential for officers or student group members to complete at the close of a month, an event, or semester. The report/evaluation should highlight successes, challenges, goals, contact people, projects in process, and issue(s) of high priority.

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- Advisor: Get the advisor involved and take advantage. If you don't have an advisor, get one. Advisors are great resources who can generally provide history and continuity for a student group. They can be the one constant in your student group. Also, if your student group runs into problems on-campus or off-campus with a vendor, the advisor can step in and help represent the group.
- Communication: Communication is essential for transition!

Sample Officer Transition Meeting Agenda

PART I: Both outgoing and incoming officers are present with advisor.

- Overview of the agenda and discussion of the goals of the meeting.
- History of the group: From past to present.
- Review short and long term goals, and progression toward them. (Goal-setting activity strongly recommended, and can be acquired from the SIL staff)
- Review of financial status and accounting history of the group. (Review past budgets requests & budget allocations)
- External review: Overview of past year's programs, events and activities, successes, and areas for improvement.
- Internal review: Overview of internal group affairs, successes with membership participation/development, areas of difficulty/areas for improvement
- Advice for the future (Evaluation forms strongly recommended)

PART II: Outgoing officers leave while incoming officers continue with advisor.

- Discussion over the role of the advisor in the student group (Advisor Expectation Checklist activity suggested).
- Discuss goals of the student group for the upcoming year. Be sure to review long term goals established by past administrations.
- Discuss ideas for internal student group development.
- Discuss ideas for external programs (i.e. events and activities).
- Discuss budget for following year (pending SU allocation, if applicable).
- Establish dates for follow through. (i.e. create a time-line)
- Discuss possible appointments of committee leadership

Outgoing Officer To-Do List

- Organize all binders/notebooks and files
- Finish all necessary correspondence (letters, email, phone calls)
- Prepare year-end report and evaluation
- Develop action plan and time-line for new officer transition
- Necessary meetings attended and conducted by officer
- Important tasks
- Sharing tasks and duties with other group members
- Introductions to key people/relationship building
- One-on-One meetings and training
- Financial Information
- Leadership training
- Review responsibilities of your position and revise if necessary

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Outgoing Officer Questions to Consider

- What I liked best about my position...
- What I liked least about my position...
- The most difficult decision I made was...
- What I could have done to make the experience better was...
- Obstacles I faced were...
- Resources which assisted me in my job were...
- Things I wish I had known before I took office ...
- Things I wish I had done before I took office...
- Our advisor helped me in my position by...
- The most helpful people/offices have been...
- The following things/people were great resources...
- What do I perceive my organization's objectives?
- What do I consider to be my main responsibility?
- What were my three biggest accomplishments?
- What did I try that did not work? Why?
- What do I wish I had done or tried, but did not?
- What are the three big issues or problem areas that will require attention this year?
- What should be done immediately in the next term?
- The legacy I hope to leave with this organization is...
- My three most important pieces of advice are...
- Other important information...

Incoming Officer Questions to Consider

- What are three things you hope to accomplish during your term as an officer?
- What are three important foreseeable problems in my group and/or position? List possible solutions.
- Things specific to my position I want to know about (challenges, forms, duties, etc.)
- Things I should do before the officer term begins...
- People (or positions) I should get to know...
- Services or policies I need to know about...
- Expectations I have for my advisor are...
- List three goals I have for the group...
- How can I best empower/work with the executive board/group?
- How can I motivate/empower the general body?
- Other questions I want/need answered...

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Online Files

Ideally, online files (consider using Portfolio) should be developed and maintained over the course of the outgoing officer's term. However, in many cases, files are created at the last minute or never utilized. Work to make group file keeping a part of the daily operations, planning and reflection of the student group. Each outgoing officer should provide their successor with the following information:

- Organizational Mission Statement
- Organizational Constitution & By-Laws
- Organizational Policies & Procedures
- Office Position Description
 - Specific responsibilities of the position
 - Any changes that are needed in the job description
- Officer Time-Line
 - Current year calendar that indicates outgoing officer activities
 - Recommended dates by which tasks should be completed to fulfill responsibilities in a timely manner
- Event/Project Documentation
 - Records of how each project, event or activity was implemented. Event Builder submissions through Portfolio are an excellent resource.
- Evaluation of Event/Project
 - Written evaluation from participants
 - Outgoing officer's feedback and recommendations
- Budget
 - Accounting of how allocated funds were spent
- Documents
 - Important forms
 - Agendas and Meeting Minutes
 - Officer and committee reports
 - Semester-end and year-end reports
 - Pertinent correspondence
- Resources
 - Key resource people helpful in fulfilling responsibilities and how to contact them
 - Name and contact information of outgoing officers
- Other Essentials
 - Keys, account transfers, mailbox information, passwords, access codes, etc.
- Outgoing Officer To-Do List

Benefits of Using Portfolio for Transition

- Portfolio uses WUSTL key for access, so there is no need to pass on login information and passwords.
- Agendas, meeting minutes, reports, etc. can all be kept in the documents section for easy access and transition.
- Event details, including concerns and advice from campus partners are maintained through Event Builder.
- Forms (and past submissions) are accessible and can easily be copied and tweaked for reuse.
- Officers can create "Transition Folders" in the news section and link to relevant documents, event submissions, etc.