

# OFFICER TRANSITIONING

## Outgoing Officer Reflection Worksheet:

Please fill out the following questionnaire for the incoming officer and/or use it as a guide when you meet to talk through the transition of responsibilities.

1. Where can materials/resources be found? (Please include digital resources and username/password information if applicable.)
2. Advisors and other people who work with the position (and contact information.)
3. Primary Responsibilities:
4. Responsibilities not listed in the position description:
5. Some things I tried that worked well:
6. Some things I tried that did not work well and why:
7. My biggest challenge was:
8. What I wish I would have known before taking the position

Please establish a timeline of due dates/events for the year:

<b>MAY</b>	<b>JUNE</b>	<b>JULY</b>	<b>AUGUST</b>
<b>SEPTEMBER</b>	<b>OCTOBER</b>	<b>NOVEMBER</b>	<b>DECEMBER</b>
<b>JANUARY</b>	<b>FEBRUARY</b>	<b>MARCH</b>	<b>APRIL</b>

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## The Three Big Questions of Officer Transitioning

### What did you do?

Talk about your goals/ the organization's goals for the year

- What were the goals?
- Which ones were accomplished?
- Which goals do you need to continue to work on?
- Which need to be changed or are no longer feasible?
- How do you measure your success in reaching goals?

### Programs and Activities

- What did you do?
- Were those things well attended/meaningful/effective?
- Did those activities/programs align with your goals and mission?
- Did we schedule well/ have a good balance for our members?
- What should be done again next year?

### What do you know?

How does the organization operate?

- How did you manage and use our money?
- Were there a lot of scheduling conflicts?
- Did you have too many/not enough/ enough meetings?

### Members and officers

- Do you have enough members? How do you recruit them? Is it successful?
- Are members as active as you need them to be? Are there ways for them to get involved in a more meaningful way?
- Where are officer roles stated? Are they stated clearly?
- How do officers interact? Is it effective?
- How do members feel about officers?
- How does communication happen within the group?

### What does the next person need to know?

How do they find resources?

- Do you have a committee structure? What is it and how does it work?
- How do they access money?
- Who is your advisor? What is their contact information? What is that person's level of involvement?
- How should they find more information?
- Who can they reach out to for help?

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## Outgoing Officer Transition Checklist:

- Complete Transition Manual for your position
- Meet with incoming officer in your role
  - Go over Transition Manual with incoming officer
- Update Student Organization Database page
- Meet with current executive board team to evaluate successes, failures, goals, etc. From tenure in position

## Transition Manual Checklist:

- Make a detailed calendar and timeline for your position/organization
- Document recurring events and programs within your position/organization
  - Include as much detail of the process as possible
- Document Student Engagement deadlines
  - I.e. President & Treasurer Training, Event Authorization, Event Funding Board, Updating the Student Organization Database, Office/ Storage Allocations
- Provide event planning checklists, transition materials, event statistics, etc.
  - Plan room reservations
  - Secure funding and outline specific event budgets
  - Outline advertising plan and timeline
- Complete Financial Summary
  - List all funding sources including Student Government Annual Allocations process and expectations (if applicable)
  - Share budget outline with executive board team including any expected expenses or incomes

# **Incoming Officer Reflection Worksheet:**

1. **Why did you choose to take the position?**
2. **What are the short-term goals you have for your position?**
3. **What are your long-term goals?**
4. **Who will you work with in this position?**
5. **What skills do you bring to the position?**
6. **What skills do you hope to develop in this role?**
7. **Talk about the ways you like to communicate with others (text/email/social media/phone/in person?)**
8. **How do you prefer to handle hard personal interactions and uncomfortable conversations?**
9. **What questions do you have for your predecessor?**