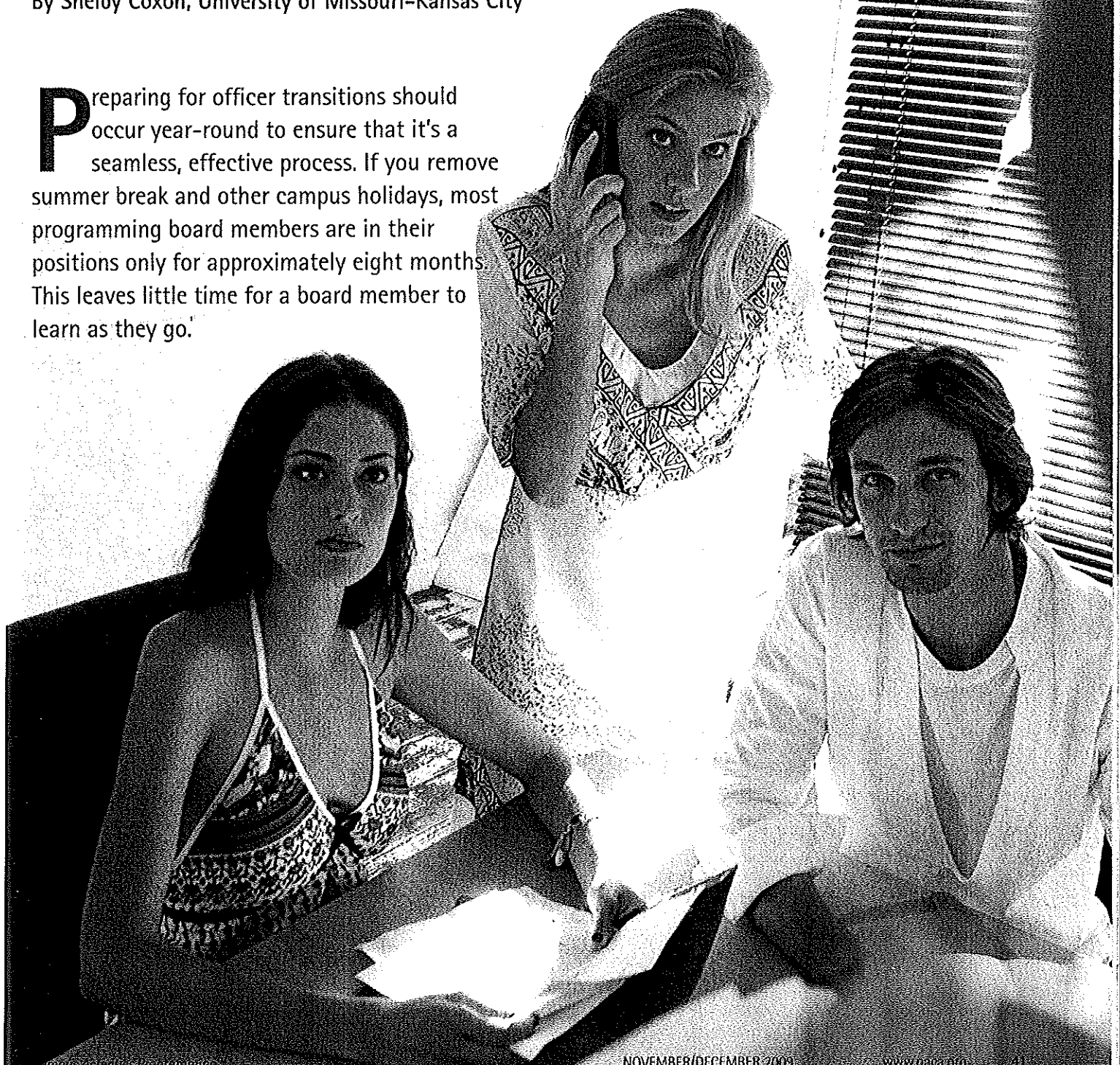


# Tips for Successful Officer Transitions

By Shelby Coxon, University of Missouri-Kansas City

Preparing for officer transitions should occur year-round to ensure that it's a seamless, effective process. If you remove summer break and other campus holidays, most programming board members are in their positions only for approximately eight months. This leaves little time for a board member to learn as they go.



## Pass on Important Details

Each officer should have a binder that is updated on a regular basis. Do not wait until the end of your term to try to develop this resource. Months later, it is very easy to forget those little details that could be beneficial to or hinder the success of any officer. Some items that should be in the binder include, but are not limited to:

- Copy of job description
- Governing documents for your board
- All appropriate forms
- List of frequently used vendors, agents, etc.
- Summary of all events and notes, including:
  - Contacts
  - Costs
  - What you wish you had known
  - Survey results and recommendations for events

Another document that can be helpful is a tickler calendar. This serves as an important chart listing responsibilities and tasks in which a position would regularly participate and complete in any given week or month. Some examples of items for the calendar might include:

- Regularly scheduled meetings
- Reports due
- Tasks to be completed for annual events such as Homecoming, Spring Fling, etc.
- Deadlines
- Retreats

As a seasoned officer on the programming board, there are many tasks that come naturally to you that might catch a new officer unawares. Therefore, it is important that you provide them with as much information as possible.

For example, on our campus, when hosting an outdoor event where electricity is required, the campus facilities office must be contacted to turn on the power to the specific outlets needed. To a veteran on the programming board, this might seem to be a small task that is not noteworthy. However, new officers might assume that power is always available. This could result in a significant delay in the start of an event, as well as much stress that could be avoided if noted in the transitional binder.

## Keep the Fire Burning

Remember how energized and motivated you were when you started with your programming organization? Remember all the amazing ideas and goals you had? For the future success of the organization, you need to end your service with that same motivation.

We all have our own reasons for getting involved in campus activities—leadership opportunities, campus pride, or an interest in serving others. We can all agree that a primary goal is to see the organization continue to flourish after our service is complete.

The commitment you initially made to your board should remain a priority through your last day in office. Do not leave loose ends for new board members. Be sure to either complete

those tasks or leave them in a place where the new officer can easily take them on. Documentation and organization are key.

## Ensure a Smooth Transition

The planning team for your officer transitions should consist of your advisor, as well as at least one member of the incoming and outgoing boards. This benefits both the incoming and outgoing leadership, as it provides new officers with valuable training and experience, and also provides the outgoing team with an opportunity to provide feedback. This ensures that they feel valued and that their ideas are noted as they end their terms.

### *Let the New Train the Old*

Another way to ensure outgoing officers are included in the transition process is to have them actively involved in the training of the new board. One suggestion would be to have their terms overlap for approximately one month. Facilitate the hiring or selection process early in the semester, and have your new board begin its term at approximately the first of April. This way, the new board can work alongside the outgoing officers and not only shadow them, but work with them for a month, receiving hands-on training. This also provides the outgoing officer time to discuss projects that need to be carried over into the next term, as well as long-term goals for the position and the board as a whole.

A process such as this can be incredibly beneficial, not only for the incoming officers, but for the outgoing officers as well. This gives them a wonderful opportunity to serve as mentors to the new officers as well as gain training and supervisory experience at the same time.

Prior to beginning this aspect of the transition process, provide outgoing officers with guidance on how to facilitate it. It is important to relay to the outgoing officers that this is a time to educate new leadership on policies and procedures, but to also help outgoing officers avoid expressing the "we've always done it this way" mindset. This attitude can stifle new leaders and hinder them from seeking new ways of going about particular programs and procedures that might result in a more efficient process.

### *Plan Your Transition Agenda*

Once your transitions team is in place, it is time to plan the agenda for your transitions. Some questions to ask yourself are:

- In what ways can we develop an environment of teamwork and spirit among the new leadership?
- What campus and community resources are important for the new board to be aware of?
- What basic functions of the position does your new board need to know?
- In what ways will you ensure that the outgoing board feels valued and that their projects and goals are reflected and carried on?
- Looking back, what are things you wish you would have known immediately that would have resulted in an easier start to your term?



*Your time on the programming board may be short, but the impact you make can last for many semesters to come.*

Being mindful of the areas you review in your transition will ensure you cover all your bases and will also result in an efficient and impactful process.

This process is even more successful when you have individuals from the incoming and outgoing board participate along with your advisor. All parties involved can provide a unique perspective and ensure that all necessary topics are covered.

#### *Respect Everyone's Time*

A thoughtful preparation also ensures that you are making the most of everyone's time. Keep that in mind as you are setting your agenda.

For example, place any activities in which the outgoing officers are required toward the beginning of the day. This way, they can complete their responsibilities, then be excused while the new board spends time goal setting and brainstorming for the upcoming year.

If you have a transition workshop, always start and end on a positive note. Plan a fun or motivational activity that will put your board members in a great mood and get them excited for the busy, but exciting year.

#### *Make Expectations Clear*

Set clear expectations early. Note all important dates, such as retreats and officer transitions, in job descriptions. This way, all those applying for positions are clear of not only specific job responsibilities, but also know that to qualify for the position, they attend all required events.

It's a good idea to incorporate yearly contracts for all officers and be sure to clearly state such requirements in these documents, as well. If your officers are paid, it is imperative that you specifically state that failure to meet job responsibilities could result in a reduction or forfeit of payment. If expectations are outlined clearly in job applications and contracts, there is no confusion regarding job responsibilities and less chance that officers will resign later.

#### **Continuing Communication Is Crucial**

Campus administrators, agents and community entities with which we work are often frustrated as our officers change with the new academic year. When transitioning to new leadership, keep these individuals in mind. Find ways via e-mail, newsletter or other means to communicate changes in your leadership to others on campus to ensure your organization and its officers are receiving information in a timely manner.

Another way to ensure consistency is to establish an e-mail address for each of your positions that can be transferred to the next person who holds any given position. E-mail addresses such as [recreationcoordinator@youruniversity.edu](mailto:recreationcoordinator@youruniversity.edu) or [UMKCBoardPresident@gmail.com](mailto:UMKCBoardPresident@gmail.com) can ensure consistency and assist those with whom you work in other departments on campus.

Your time on the programming board may be short, but the impact you make can last for many semesters to come. Your campus programming board is an essential element in student retention and overall student satisfaction, and your ability to successfully manage your board is the crucial to its success.

#### **About the Author**

Shelby Coxon is interim director of the Student Life Office at the University of Missouri-Kansas City. She has served on the NACA Central Regional Conference Committee since 2007 and is now the region's Volunteer Center Coordinator. She holds a bachelor's degree in criminal justice from Missouri Western State University and a master's degree in higher education administration from The University of Kansas.

