

ASUI Student Clubs & Organizations

Transitioning Leadership

Sponsored by
Student Activities and Leadership Programs Office
Commons 302
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<http://stuorgs.uidaho.edu>

Officer Transition Planning

Remember:

Although transition can be a time consuming process it is vital to an organizations continued success!

Why is officer transition planning important?

1. Don't have to reinvent the wheel.
2. Start the year off with momentum.
3. Avoid unnecessary confusion that could lead to lost membership.
4. Keep the group on track:
 - a. Traditions/History
 - b. Mission
 - c. Goals
5. New officer will have more knowledge and confidence to do their jobs.
6. Helps outgoing officers feel their experience is being utilized which can also provide a sense of closure.

Steps to a Smooth Transition of Officers

Start early:

1. Notebook it
2. Shadowing
3. Information Transfer Session

Evaluate

1. Be Honest
2. Avoid "group think"
3. Seven Areas to Evaluation: mission statement, goals, objectives, strengths, weaknesses, resources, threats
4. Avoid Comparison

TRANSITION REPORT CHECKLIST

The following topics should be gathered in a binder or folder and discussed with incoming leaders, at a transition meeting or retreat. Include forms or addendums where appropriate and write a couple paragraphs about pertinent items.

1. Group History

- Explanation of group history including any regional or national connections
- Explanation of traditions or events that the group does on a regular basis
- Explanations of challenges that your group historically faces
- Discussion of who has historically been attracted to your group
- What has been the leadership structure? Provide a brief review of job descriptions.
- Copy of Constitution

2. Group Challenges

- Discussion of challenges to meeting past goals
- Discuss challenges to recruiting new members, holding certain events, fundraising, ASUI funding, working with certain campus offices, etc.

3. Group Resources

- Discuss any members who have particular skills
- Update email lists and contact information for members
- List faculty or staff who have been helpful or expressed an interest in your group
- List offices, people or businesses that have been helpful by collaborating with your group, offering discounts, providing advice, etc.

4. Budget

- List funding sources for the previous year, including contact information and other details about communicating with your source
- List successful fundraising events, including amounts raised. Attached Event debriefs to this transition report for all fundraising events.
- Attach a copy of the previous year's budget
- Attach a copy of any ASUI allocations
- Attach bank information, if applicable. Make sure to change signatory status.

5. Policies and Procedures

- Leave behind University policies, ASUI policies, constitution, mission statement, goals and objectives for the previous year, contact information, info on group registration, agenda and minutes, calendars, etc.

6. Events

- Attach Events Debriefs to this report for each event
- Attach a program budget for each event
- Highlight which events were a great success, and which should not be done again
- Pass down all materials needed for planning events (ie: timelines, contact information, policy procedures)

7. Future Recommendations

- What have you learned from your leadership time with the group?
- What additional secrets can you pass on to the group?
- Outline recommendations for the future of the group.
- List important dates/forms which the new officer should be aware of.
- What are things you wish you would have known before you started?

- Outline improvements that could be made to the way the group operates recruits and motivates members, works with campus offices, works with other regional or national offices, etc.

TRANSITION CHECKLIST-WHAT TO DO AND WHEN

Part I – Outgoing Leaders

- 1. Early in the year**
 - a. Begin early by developing, motivating and encouraging new leaders
 - b. Make a concerted effort to document meetings, plans, budget and evaluation of programs
 - c. Develop a mentoring or shadowing program with potential leaders
 - d. Focus on leadership development and organization of group's materials
- 2. Later in the year**
 - a. Elect new officers at least one month before officers transition out of their positions (if possible)
 - b. Consider what you wish someone else had told you when you started
 - c. Create a transition report
 - d. Hold a transition retreat with new and outgoing officers and encourage ongoing contact and communication
 - e. Update your constitution
 - f. Introduce new leaders to advisors, resources and members
 - g. Orient new leaders to finances, facilities reservation, record keeping, constitution, policies, position descriptions, web-page and program planning
 - h. **SIGN OVER BANK ACCOUNT TO NEW LEADERS.** If your club leaders have access to your club's bank account, make sure you go with the newly elected leaders to the bank to fill out transfer paperwork and signature cards.

Part II – Incoming Leaders

Meet with your faculty advisor early so you can benefit from the full range of resources available to your organization.

Re-register your organization with ASUI and attend a mandatory **CLUB OFFICER TRAINING SESSION WITH ASUI/STUDENT ACTIVITIES COORDINATOR** (look for an email about this or contact clubs@stuorgs.uidaho.edu or 885-6331).

- 3. Goal Setting**
 - a. Evaluate past year's concerns and achievements
 - b. Evaluate past officer's goals
 - c. Establish new officer goals
 - d. Have a group goal-setting session
 - e. Prioritize goals with the group and create a timeline
 - f. Delegate tasks and make a plan for following up with tasks
 - g. Plan for development opportunities – meetings with advisor, attending trainings and workshops, conferences, etc.
- 4. Programming**
 - a. Brainstorm with your group what events will happen this year
 - b. Develop a master calendar with meetings, programs and events
 - c. Develop a web-page, or make current your existing web-page
 - d. Establish structure, committees or meeting agendas

Incoming Officer Questions:

Questions to ask during transition

1. Things specific to this position I want to know about (forms, duties, ect.) are...
2. Things I should do over the summer are...
3. People that I should get to know are...
4. Services I need to know about are...
5. Things I need to know about are...
6. Other questions I want answered are...
7. One of my personal goals while in this position is...

Outgoing Officer Questions:

Questions to answer before passing the torch

1. What I liked most about my position was...
2. What I liked least about my position was...
3. The most difficult decision I made was...
4. What I could have done to make the experience better was...
5. Obstacles to performing my job effectively were...
6. People or things that assisted me in handling my job were...
7. Things I wish I'd known before I took the position were...
8. Our constitution, history, files, books ect...are located...
9. Our past and future budgets and plans are located...

10. The best qualities of and best ways to use our advisor are...

11. The things I hope I never forget are...

12. Things I wish I'd discovered sooner were...

13. Things I still need to learn...

14. The most helpful people/resources have been...

Year in Review

Individual Brainstorm Sheet

What are the organization's current long-term goals?

- 1.
- 2.
- 3.

What are the organization's current short-term goals?

- 1.
- 2.
- 3.

Organizational Strengths:

- 1.
- 2.
- 3.
- 4.
- 5.

Organizational Weaknesses:

- 1.
- 2.
- 3.
- 4.
- 5.

Programs and services offered by the organization

- 1.
- 2.
- 3.

How do the above programs/services further the mission of the organization?

Group Resources:

- 1.
- 2.
- 3.

Resources/Opportunities not taken advantage of:

- 1.
- 2.
- 3.

What threats do you see to the organization?

- 1.
- 2.
- 3.