

## **Officer Transition**

### **Overview**

Your year as an officer is coming to an end and new officers are being selected. How do you leave your position gracefully? How do you ensure that the new officers are ready to continue to provide your organization with strong leadership?

### **Purpose**

A thorough leadership transition plan is:

- the responsibility of both the outgoing and incoming officers
- a way to help the group avoid starting over or starting from scratch every year
- a transfer of significant organizational knowledge
- minimizes the confusion of leadership changeover
- gives outgoing leaders a sense of closure
- a great opportunity for outgoing leaders to evaluate the year
- an orientation process for new leaders
- drives a leadership changeover period
- utilizes the valuable contributions of experienced leaders, usually the most neglected members in your group
- helps incoming leadership absorb the special expertise of the outgoing leadership
- increases the knowledge and confidence of the new leadership

### **Background**

*When do you start? Early!*

- Begin identifying emerging leaders early in the year.
- Encourage these potential leaders through personal contact; help in developing skills, delegating responsibility to them, sharing with them the personal benefits of leadership, clarifying job responsibilities, letting them know that the transition will be orderly and thorough, and lastly, modeling an open, encouraging leadership style.
- When new officers have been elected, orient them together as a group with all of the outgoing officers. This process provides the new leaders with an opportunity to understand each other's roles and to start building their leadership team.
- Be sure to transfer the knowledge and information necessary for them to function well. An organization history and flow-chart might be helpful. Take time to organize any files or notebooks so they may quickly access information.

*What do you need to transfer?*

Think back to your first weeks. What could you have used to do your job better? Some suggestions are:

- effective leadership qualities and skills
- helpful ideas, procedures, and recommendations
- written reports containing traditions, ideas or completed projects; continuing projects and concerns; or ideas never carried out
- personal and organizational files
- acquaintance with physical environment, supplies, equipment and any office procedures
- introduction to personnel (advisors, administrators, contacts, etc.)



## **Officer Transition**

A complete record of the organization's structure, goals and accomplishments (through complete and organized files) includes:

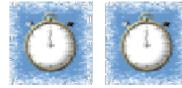
- constitution and by-laws
- organizational goals and objectives for previous year(s)
- job descriptions/role clarifications
- status reports on ongoing projects
- evaluations of previous projects and programs
- previous minutes and reports
- resources/contacts lists with addresses and phone numbers
- SPAC Leadership Tips
- financial books and information
- mailing lists

### **Activity**

#### *Officer Notebook*

If your outgoing officers don't already have a notebook, provide them with an inexpensive one with pocket dividers and an outline of what they should include in the notebook they are preparing to pass on, such as the following items. You can add a calendar for the coming quarter, officer and member roster, budget, and constitution and bylaws.

1. Job description
  - a. Specific responsibilities of the position
  - b. Any changes that are needed in the job description
2. Job timeline
  - a. Current year calendar that indicates when outgoing officer did everything
  - b. Recommended dates by which job tasks should be completed to fulfill responsibilities in a timely manner
3. Event/Project documentation
  - a. Records of how each project, event or activity was orchestrated, including files on disk and hard copies, for example: facility, facility cost, when reservation must be made; guest speaker invitation and thank you letters; award categories and criteria; application; application timetable; gifts for award winners, vendor, address, phone, cost, invoice, how far in advance to order; guest list; invitation, printer, number of copies, cost, invoice, alternative sources, production schedule, invitation distribution timetable; etc.
4. Evaluation of event/project
  - a. Written evaluation from participants if collected
  - b. Outgoing officer's feedback and recommendations
5. Budget
  - a. Accounting of how allocated funds were spent
6. Resources
  - a. Contact information for key people helpful in fulfilling responsibilities
7. Other essentials
  - a. Keys, account transfers, P.O. Box number, etc.



## Officer Transition

The officer notebook can be shared during the meetings with your replacement. It should cover all aspects of your responsibilities and how those tasks fit into the organization's big picture. Recommend that your replacement file "historical" documents, such as meetings minutes, in the notebook when they have become comfortable with the information. This way, the notebook can be used as a working tool, rather than something to be completed at the end of the year (usually during finals!). Each organization is different, so feel free to add and delete topics. Your replacement will thank you throughout the year!

### Outgoing/Incoming Officer Evaluations

The following evaluations may be completed by the outgoing and incoming officers and included in the officer notebook.

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## OUTGOING OFFICER EVALUATION

Name of Outgoing Officer: \_\_\_\_\_  
Office: \_\_\_\_\_  
Date: \_\_\_\_\_

List three things during your term in office that were considered most important.

- 1.
- 2.
- 3.

List three things you wish you had done during your term in office.

- 1.
- 2.
- 3.

List three important "pieces of advice" for the incoming officer.

- 1.
- 2.
- 3.

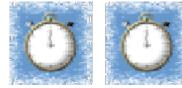
List any outstanding items that still need completion prior to your leaving office:

As outgoing \_\_\_\_\_ (officer title), I promise to assist the newly elected officer in any way I can.

\_\_\_\_\_  
Outgoing Officer Signature

\_\_\_\_\_  
Date

Return this form to your organization's president for filing.



## Officer Transition

### INCOMING OFFICER EVALUATION

Name of Incoming Officer: \_\_\_\_\_  
Office: \_\_\_\_\_  
Date: \_\_\_\_\_

List three things that made you want to run for this office and why.

- 1.
- 2.
- 3.

List three new ideas that you would like to implement for your office this year.

- 1.
- 2.
- 3.

List three important foreseeable problems in your office.

- 1.
- 2.
- 3.

List possible solutions to the above three problems.

As incoming \_\_\_\_\_ (officer title), I promise to ask the assistance of the outgoing officer or president when I need help.

\_\_\_\_\_  
Incoming Officer Signature

\_\_\_\_\_  
Date

Return this form to your organization's president for filing.