A successful yearly transition from outgoing to incoming officers is key to creating and sustaining a productive, effective organization.

Why is the transition process important?

- To provide for the transfer of important organizational knowledge/information
- To inform and prepare incoming officers for their new positions
- To provide a sense of accomplishment and closure for the outgoing officers
- To capitalize on the valuable contributions of experienced leaders
- To increase the knowledge and confidence of the new leadership
- To minimize the loss of momentum the group has at the end of the year
- To provide a sense of community among the leadership and membership

OUTGOING OFFICER

Each outgoing officer should maintain records of meetings, receipts and/or events that took place within the past year. This information can be kept in a binder, electronically (CD, zip drive, googledocs, etc.) or both, and should be organized in a way that is useful to each position. Suggested topics/information include:

Governing Documents

- Constitution/Bylaws
- Organizational rules/policies
- Standing rules
- Organizational goals/objectives
- Position descriptions
- End of semester officer report:
  - What do you wish you had been told before taking this position?
  - What were your major challenges and accomplishments in your position?
  - What are ideas that you tried and did not work? Why did they not work?
  - What do you recommend the next officer try? Why?
  - What is the most rewarding aspect of this position?
  - What projects did you start, but found you were unable to complete? What are the steps the incoming officer could take to accomplish this project?

Key Contacts/Resources

- List of university resources and contact information (Student Activities staff, organization advisor, etc.)
- List of community resources and contact information (vendors for events, sponsors/donors, etc.)

Calendar/Timeline of Events

- Calendar of events and activities for last year
- Records of past year’s activities
- List of events, tasks, deadlines for particular position

Additional Information

- Copies of significant correspondence
- Previous meeting minutes/reports
- Budget information
INCOMING OFFICER

Incoming officers should also come to the transition meeting prepared with ideas and questions for the outgoing officer. Below are some ideas:

- What do you want to accomplish during your term?
- What ideas do you have for your position?
- What do you want to take away from this position?
- How do you see this position aligning with your personal goals?
- What skills will you need to be successful in this position?

Questions for the outgoing officer:

- What are specific things about the position I should know about?
- What should I do first? What are the most important priorities of this position?
- What did you try that did not work? Why?
- What do you wish you had done, but did not?

SAMPLE TRANSITION RETREAT/MEETING TOPICS

While binders and informal information sharing is important, it is crucial for the outgoing and incoming officers to meet formally and discuss ideas and answer questions. This can be done in a retreat format or a meeting. Below are some ideas of topics to cover in that transition retreat or meeting.

I. Introductions/Overview of Agenda
II. Icebreakers/Team Builders to allow officers to get to know each other better
III. Review of Responsibilities for the entire officer board (university policies, organization expectations, organization goals, etc.)
IV. Individual Meeting time for outgoing and incoming officers
   a. Review of position
   b. Review of binder/documents
   c. Advice/tips for incoming officer based on end of semester report
   d. Question and Answer session for incoming officer to ask specific questions
   e. Goal-setting for next year
V. *Goal-Setting Conversation for the larger group
   a. Small groups can report back what they discussed in individual meetings about goals for next year
   b. Begin developing an action plan for achieving goals
VI. *Roundtable Discussion for the whole group
   a. Discuss any thoughts/feelings about the activities
   b. Ask for any final pieces of advice from outgoing officers
   c. Ask for any final questions/concerns from the incoming officers
VII. *Next Steps: Set a meeting time for the incoming officers to meet again to continue with goal-setting and action planning

*You may choose to conduct these sessions with just the incoming officers.

Sources:
- Notre Dame Student Activities Office: https://www3.nd.edu/~sao/thesource/officertransition.html
- Alpha Phi Omega Impact Project: https://apoimpactproject.wikispaces.com/Officer+transition