

Officer Transitioning

The key to successful transitions is making sure new officers know their jobs BEFORE they take office. Expectations should be clearly defined. This manual provides an example of how to effectively transition organization members.

OUTGOING OFFICERS EVALUATION HANDOUT

This worksheet should be discussed and completed as an outgoing team.

1. Have we developed members who will prove to be exceptional and involved?
2. Will the membership be innovative and creative after we have left?
3. What programs/ideas proved to be successful for us?
4. What was our greatest achievement as an executive board?
5. List three things that we would like to have accomplished:

6. List three things that we would like our successors to achieve:

OUTGOING BINDER HANDOUT

This may be the most difficult work in your transition process. If your binder is cleaned out and organized, it will make everything else run smoother!

- _____ Philosophy, mission or purpose statement of the organization
- _____ Constitution and Bylaws
- _____ Job description of officers
- _____ Description of committees
- _____ Organization membership list
- _____ Historical records of organization
- _____ Meeting minutes and agendas
- _____ Listing of basic annual procedures (student organization registration, room reservations, etc)
- _____ Calendar of past year with annual events
- _____ Financial records
- _____ Resources or contact list of important people
- _____ Recommendations for the upcoming year

END OF SEMESTER REPORT HANDOUT

Purpose – To assist in officer transition by focusing upon the accomplishments and to provide a critique of your year in office. This report should serve your successor as a supplementary resource in planning for his/her term.

1. List other officers/chair people with whom you worked with and the projects involved.
2. List specific successes realized during your term in office and the reasons for their success.
3. List any problems or disappointments you encountered as part of your office and suggest ways of avoiding or correcting them.
4. List supplemental materials and sources of information you found most helpful. Include faculty contacts, staff contacts, community resources, etc.
5. Comment on the timetable applicable to your office. Give suggestions for increasing efficiency and effectiveness.
6. List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

FIRST ONE-ON-ONE MEETING HANDOUT

Make this as comfortable and relaxing as possible. Do not breeze through this information. TAKE YOUR TIME. Remember that you are very comfortable with this information and the responsibilities of this office after serving for a full year. Remember that all of this is new to the incoming officer. Take time to explain this information and go over everything on the checklist.

- _____ Give your cleaned out, organized binder to the new officer and explain the contents.
- _____ Explain the duties and responsibilities of the office.
- _____ Explain the duties that go along with the office that are not in the officer's description
- _____ Review the past year's calendar and explain programs and events.
- _____ Read through constitution and bylaws.
- _____ Explain forms and files that have been started over the past year.
- _____ Review historical files.
- _____ Review the officers budget (if you don't know what it is, get with the treasurer before you have your first one-on-one meeting).
- _____ Check supplies and materials that this officer requires. Explain to the officer how to get the supplies and where to get them.
- _____ Together, brainstorm some goals for this office.
- _____ Discuss time lines and deadlines for this office. Discuss the importance of meeting deadlines for events/forms.
- _____ Set the date for a second one-on-one meeting.

SECOND ONE-ON-ONE MEETING HANDOUT

After the new officer has had a week to soak in the information and to write down some pertinent questions, set up your SECOND ONE-ON-ONE MEETING.

4. What new/old programs do I plan to utilize during my term in office?

5. What short term goals do I want to accomplish (5 goals)? How am I going to accomplish those goals?

6. What long term goals do I want to accomplish (5 goals)? How am I going to accomplish those goals?

**NEW OFFICER - ELECT
WORKSHEET
HANDOUT**

What do we want to accomplish in the long term (one year)?

WHAT WE WANT TO ACCOMPLISH

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

PRIORITIZED LIST

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

What five goals do we want to accomplish in the short term (one semester)?

How are we going to achieve these goals?

GROUP BALANCE SHEET HANDOUT

Often we need to ask ourselves a few questions before we know how we stand as a group. A few good questions to ask ourselves are:

1. Is there a group consensus as to where we are headed?
2. Does every member participate in the decision-making process?
3. Does every member do his/her share in organizational operations?
4. Do the officers know what the members really want?
5. Does everyone have a strong, positive feeling about the organization?
6. Do we know what is contained in our mission statement (Constitution and Bylaws)?
7. What is our self-image?
8. What things do we, as a group, do well?
9. What do we have trouble doing?
10. How do we work together?
11. Do we have definite goals?
12. How can we have a higher profile on campus?
13. What weakness do we need to correct this year?
14. Do the general members support the differences?

15. How much do we want to be successful?

16. What do we want out of this experience?

17. What can each of us contribute to make our experience more meaningful?

SOTS transitions

-Only President can log into program and update

- Pass down access code

-<http://www.ndsu.edu/bisonweb/>

-click on Student Organizations (CSO)

- Student Online Tracking System

CSO Guidelines

-Go to Bisonweb

-CSO Documents

Mailboxes- where Student Activities Office/ Student Government Offices are located at

***ThundarBolts- good information:**

[http://www.ndsu.edu/memorial union/studentorgs/](http://www.ndsu.edu/memorial_union/studentorgs/)

-click on ThundarBolts

Questions- contact Brianne at Brianne.Montgomery@ndsu.edu

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