

**Campus Involvement Center  
Officer Transition Guide**

*Parts of this transition guide were adapted from the Ithaca College Transition Guide for Student Organizations.*

**Purpose of Officer Transition**

- Transfer ownership and historical knowledge of the organization
- Maintain seamless continuity of the organization’s progress, growth, and goals
- Reinforce productive communication and support between officers to plan and create new goals
- Further develop sense of pride and mission-aligned purpose in the new officers

**Transition Recommendation:**

When transitioning officer duties, we recommend following the outlined steps:

1. Outgoing officers complete the ‘outgoing officer checklist’ and ‘outgoing officer worksheet’
2. Incoming officers complete the ‘incoming officer worksheet’
3. Outgoing and new officer board meet for transition meeting (sample agenda below)
  - a. During the group transition meeting, ensure time is allocated for one-on-one meetings for individual officer transitions

**Outgoing Officer Checklist**

Use the below to guide transition from outgoing to incoming officers. Best practice is to provide too much information, rather than not enough.

Documentation	People	Additional Tasks
<ul style="list-style-type: none"> <li><input type="checkbox"/> Organize all files, notebooks, binders, and electronic files in an accessible place</li> <li><input type="checkbox"/> Update organization constitution and bylaws</li> <li><input type="checkbox"/> Outline and update position responsibility descriptions</li> <li><input type="checkbox"/> Make an asset list of your organization supplies and where to find them</li> <li><input type="checkbox"/> Document any login information for social media, email accounts, etc.</li> <li><input type="checkbox"/> Create a commonly used resource list (contacts, room booking links, vendors, etc.)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Introduce officers to important organization contacts via email or in person meeting</li> <li><input type="checkbox"/> Connect new officers with your organization advisor</li> <li><input type="checkbox"/> Provide outgoing officer information, phone numbers, and emails</li> <li><input type="checkbox"/> Share organization member contact information (emails, phone numbers, etc.)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Reserve meeting rooms for upcoming year on Virtual EMS (Baker) or Astra (Classrooms)</li> <li><input type="checkbox"/> Finish all necessary correspondence (emails, etc.)</li> <li><input type="checkbox"/> Re-register the organization on Bobcat Connect</li> <li><input type="checkbox"/> Share important training dates, upcoming opportunities/tasks/training information with new officers (e.g. Involvement fair), etc.</li> <li><input type="checkbox"/> Create samples of meeting minutes and agendas</li> </ul>

### Timelines and Event Specific Transitions

If your organization has annual events or traditions, be sure to share a timeline of events and funding information with incoming officers.

Time Orientation	Event-Specific
<ul style="list-style-type: none"><li><input type="checkbox"/> Make a detailed calendar and timeline</li> <li><input type="checkbox"/> Document campus events for new officers to be aware of/ plan around (e.g. Involvement Fair, Homecoming, Parent’s Weekend, Senior Week, etc.)</li> <li><input type="checkbox"/> Document SAC Funding deadlines and their rules regarding funding (must submit budget requests <i>before</i> events)</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Provide previous event planning checklists, risk management plans, and statistics of attendance</li> <li><input type="checkbox"/> Plan room reservations, advertising, budgeting, etc.</li> <li><input type="checkbox"/> Plan marketing: electronic copies, Bobcat Connect event requests, etc.</li> <li><input type="checkbox"/> Complete semesterly SAC funding requests</li> <li><input type="checkbox"/> Share past SAC budget requests for new officers to reference</li> <li><input type="checkbox"/> Complete Event “Brain Dumps” for each event your organization hosts (see sample at the end of this packet)</li></ul>

## Outgoing Officer Worksheet

Completing this worksheet will help incoming officers achieve success in the role. Consider what would have been helpful to know when you began the role. The more thorough and detailed you can be, the better off the new officer will be! Going over your answers together will provide an opportunity for the incoming officer to ask questions.

1. In my own words, the major responsibilities of this role are...
2. If I had to divide my responsibilities into a pie chart, it would look like...
3. The most valuable thing(s) I learned about being effective in my role were...
4. Obstacles to completing my position responsibilities effectively were...
5. Something I tried that did not work and why...
6. Things that helped me better handle the responsibilities of the position were...
7. Things I wish I would have known before taking this officer position were...

8. The greatest responsibility of the position is...

9. How can this position have a meaningful impact on the organization?

10. If I had another year in the position, my priority/vision for the role would be...

11. When I needed help, these were my resources....

12. Go to the Campus Involvement Center for...

## Incoming Officer Worksheet

Incoming officers should complete this worksheet before meeting with the outgoing officer for their role. The worksheet is intended to help you idealize your role and generate questions about how to do your job successfully.

1. In my own words, the mission of the organization is the following:
2. Why did I want this role? What skills or experiences do I want to gain?
3. What position-specific things do I need to know about (e.g. forms, meetings, reports, events, timeline, duties, etc.)? Generate a list to ask the outgoing officer about.
4. List the tasks you think you should do in the next month. Ask the outgoing officer if there is anything else they think you should add.
5. Generate a list of people you think you should get to know to serve as helpful resources. Ask the outgoing officer if there is anyone else to add.
6. What other resources should I use to complete the duties of my role (i.e. websites, offices, etc.). Ask the outgoing officer if there is anything else to add.
7. What will my self-care plan be?

8. What am I most nervous about? What questions could I ask the outgoing officer to ease these nerves?
  
9. What expectations do I have for myself in this position? Ask the outgoing officer if these seem reasonable or if they have anything to add.
  
10. What expectations do I have for the rest of the officer board? Ask the outgoing officer if these seem reasonable or if they have anything to add.
  
11. What expectations do you believe others have of you and the rest of the incoming officer board? Ask the outgoing officer if they have anything else to add.

## Transition Meeting for Outgoing and Incoming Officers

After organizing your information, your organization should schedule transition meetings for the outgoing and incoming officer boards.

### *Sample Agenda for Transition Meeting*

Required Participants: Outgoing and incoming officers

Recommended Participant: Organization Advisor

Agenda:

- Ice breaker activity to help everyone get in the proper mindset for transitioning
  - Potential activity: Each person could share their pits and peaks relating to the organization for the past year. This will help participants reflect on the organization's strengths and areas for growth.
- Mission, Vision, Values
  - Remind incoming officers of the 'why' of your organization
- State of the Organization Report
  - Outgoing officers should be prepared to report successes, challenges, and current climate of the organization
  - Completing a SWOT (strengths, weaknesses, opportunities, threats) analysis could be useful
- Organization Accounts and Digital Sites
  - Share all organization passwords and run through accounts (Social media, emails, Google Drive, etc.)
  - Bobcat Connect: roster updates, how to register an event, etc.
- Organization Timeline
  - Summer To-Do's
    - Who will re-register the organization, submit involvement fair application, etc.
  - Fall Calendar
    - Typical events, membership drives, etc.
    - Required fall training for president's and treasurer's (typically hosted before the involvement fair)
    - SAC funding
  - Spring Calendar
    - Typical events, membership drives, etc.
    - SAC funding
- Breakout Session: 30-60 minutes for individual transitions (I.e. the outgoing president meets with the new president to do a role-specific transition, etc.)
- Farewells to outgoing officers
- New officers stay and new president lead first executive meeting. Items to consider may include the following:
  - Consider summer duties and beginning of school year plans for the organization
  - Set next year's full board meeting times and reserve meeting space
  - Set next year's officer board meeting times and reserve meeting space
  - Sign up for the involvement fair and decide who will be creating the involvement fair table materials
  - Goal setting for next year
    - A summer or fall officer planning retreat is useful for many organizations. Discuss this option!
    - There is a sample goal setting worksheet at the end of this document
- Adjourn the meeting

### New Officer Group Worksheet

New officers can use this worksheet to help the group achieve a sense of common purpose and to set goals.

1. How would we describe your organization to someone who is unfamiliar with it?

2.

What is the mission of our organization?	What is our vision for the organization? Vision is what the organization aspires to be in the future.

3. How does our organization execute our mission and vision? What philosophies, activities, or events does our organization host? Do they all align with our organization's purpose?

4. Do we think organization members would be able to articulate the organization's mission? If no, how can we communicate the mission?

5. How is our organization structured? Does the officer, committee, and informal role structure equitably distribute labor?

6. How are our organization's meetings structured? Do members engage?

7. Besides meetings, what kinds of activities does our organization host? Do most members attend? Do only a subset attend? If just a subset, what does that group have in common?

8. Use the chart below to set SMARTIE goals for the upcoming year.

SMARTIE Description	Goal 1	Goal 2	Goal 3
<b>Specific</b> <ul style="list-style-type: none"> <li>• What do we want to accomplish?</li> <li>• What are the requirements and constraints?</li> <li>•</li> </ul>			
<b>Measurable</b> <ul style="list-style-type: none"> <li>• How will we measure progress?</li> <li>• How will we know when the goal is accomplished?</li> </ul>			
<b>Achievable</b> <ul style="list-style-type: none"> <li>• How can the goal be accomplished?</li> <li>• What logical steps can we take?</li> </ul>			
<b>Relevant</b> <ul style="list-style-type: none"> <li>• Is this a worthwhile goal?</li> <li>• What resources do we need to obtain?</li> </ul>			
<b>Timely</b> <ul style="list-style-type: none"> <li>• How long will it take?</li> <li>• When are we going to work on this goal?</li> <li>• What is our deadline?</li> </ul>			
<b>Inclusive</b> <ul style="list-style-type: none"> <li>• Does our process bring traditionally marginalized folks into the process, activities, and decision-making roles?</li> </ul>			
<b>Equitable</b> <ul style="list-style-type: none"> <li>• Does our process include elements of fairness or justice that seek to create equitable opportunities for all members?</li> </ul>			

## Sample: Event Brain Dump

### How to Get Involved: Featuring Ohio Student Leaders - Brain Dump

This is a sample “brain dump” for an event hosted by Student Alumni Board in 2016. The event planner documented the why, what, where, when, and how. Information included a timeline, emails sent, event materials, and recommendations for the event in the previous year. These documents are very useful when it is time for officer transitions.

**Why:** At our executive retreat, we were thinking about B2B panels and how we could make them more relevant for students. The conversation spiraled into recruiting quality members since we have 30 seniors leaving in May 2017. We decided that a panel targeting freshmen and sophomores who would be attracted to hearing from student leaders would be people we want in SAB. Also, framing this as a recruitment tool to other orgs made it attractive to other student leaders. After the panel we decided to host a tabling session where all the groups would have tables.

**What:** Panel featuring student leaders presidents that targeted freshmen

- Student Senate
- BSCP
- Bobcathon
- International Student Union
- UPC
- National Pan-Hellenic Council
- Interfraternity Council
- Student Alumni Board

**Where:** Schoonover 145. The room seats 150+, so it was too large. Also, be careful when working in Schoonover. Posters cannot be hung in certain places and the lobby space cannot be rented, so you will have to use the atrium space in the lobby downstairs if you want to set up any tables.

**When:** Thursday, September 1 (Week 2!!!). --Thursday seemed to be a good night for the student leaders.

**How:** We thought of this idea two weeks before school started at our executive retreat, so we didn’t have a lot of time to move. A timeline is below, but I would suggest doing everything we did **at least** mid-summer

3 weeks out	Sent email to potential panelists--gave them 1 week to reply (was middle of 1st week of school when they confirmed, which only gave Ellie 2 days to make fliers(!!!)- -would not recommend waiting this long for everyone’s sake, but we were crammed for time). See sample email below.
3 weeks out	Booked Schoonover 145
2 weeks out	Ordered 11 tables (3 for panel, 8 for tabling after) and chairs from Moving & Surplus
2 weeks out	Placed catering order for 75 cookies and punch
2 weeks out	Booked microphone and sound system from Event Services

1 week out	Sent confirmation email and event details to confirmed panelists (see below for sample).
1 week out	Put in campus buildings--next year it would be great if we could get into dorms and also have the event on the screens in Baker. I would hang fliers the first week of school if possible
1 week out	Email interest list from Student Org Involvement Fair about the event--Mak and Kayla both sent out emails
1 week out	Katrina sent out email to 400 or so freshmen
1 week out	Began blasting content on social media
Day of	Set up and host!
Day of	Be sure to give all the panelists thank you notes!
2 or 3 days after	Send follow up email to participants

**Sample email to student leader asking them to join (can paste for next year):**

Hi Jeffrey,

My name is Makenzie Olaker, and I am the president of Student Alumni Board. I know our organizations have worked together before, but I don't think we have met personally! This year SAB is hosting a new event called Student Leader Panel. The Panel is aimed towards a freshmen audience and will feature top student leaders across OHIO's campus. Leaders will get to share their stories about how they became a leader and what it means to have a leadership role. We hope that this event will be informational and inspiring to freshman students as well as a great recruitment tool for the organizations that the panelists are representing!

We would love to continue working with BSCPB and we think that you would provide valuable input as a student leader on the panel! The panel will be on **September 1 at 7:00 PM in Schoonover 145**. One hour will be dedicated to the panel where a moderator as well as the audience will ask the leaders questions. Following the panel, we will have tables set up for each leader and a few of their members to represent their organization and be asked one-on-one questions if students so wish! If this is something you are interested in doing, please let me know by **5pm on Wednesday, August 24**— we would love to have you!

I look forward to hearing from you and hopefully having you on the panel in September!

**Confirmation email:**

Hi all,

Once again, thank you so much for serving on the **How to Get Involved: Featuring OHIO Student Leaders** panel on **Thursday, September 1 from 7- 8:30 pm in Schoonover 450**. Snappy casual with some of your org gear is good for dress. Also, feel free to invite members from your organization to watch the panel and to represent your organization after the panel ends.

Eight presidents are included in the panel, and I couldn't be more excited to work with you all. If you all don't know each other, here's the list of

President's and their organizations:

- Student Senate

Campus Involvement Center



- BSCP
- Bobcathon
- International Student Union
- UPC
- National Pan-Hellenic Council
- Interfraternity Council
- Student Alumni Board

I have attached the panel questions that we will go through if you would like to think about your answers in advance.

Since this event is so early in the semester and new, SAB is going to blast marketing everywhere we can this week for freshmen and sophomores to potentially see. I've attached a flier for social media and an 8x10 and 11x17 flier if you would like to do any marketing or share it with your members! We have also made a catering order, so feel free to share that there will be snacks provided.

I think that is everything! If you have any questions or suggestions, feel free to shoot me an email at any time.

Can't wait to see/meet you all this Thursday!

Makenzie

**List of questions used:**

1. Introduce yourselves
  - a. Name, year, major, position and organization that you're representing
  - b. A little bit about the organization and how/when you got involved in it
2. What is your definition of a leader?
3. What specifically did you do freshman/sophomore year to become active in your organization?
4. Tell us how you became president of your organization? (i.e. - what was your journey to this role like, is this something you planned on since your freshman year, etc.)
5. When you first took on this leadership role in your organization, how confident and prepared did you feel stepping into it?
6. What have you gained personally from being involved? (friendships, personal skills, what you've learned about yourself etc.)
7. What opportunities have you received as a result of being a leader on OHIO's campus?
8. What are your strategies for managing a full load of classes and being an active in your student organization?
9. How do you manage your stress, and how has that changed throughout your college career?
10. What can underclassmen do to maximize their first year within an organization?
11. In hindsight, what is one piece of advice you would give your freshman self?

**More things to think about next year:**

-Attendance was pretty mediocre with about 40 students who attended. If we could target more Learning Communities and RA's, I think attendance would increase. Wendy Rodgers, director for LCs, was willing to work with us, and I bet if we reached out earlier, we could see if they could get the event on the syllabus during their "Involvement Week"

-Most of the organizations were great to work with and the event seemed to open collaboration doors more than anything else between the student leaders. They said they would like to do something again in the spring, so we'll see! The only sticky area was working deciding which orgs get to be represented.

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-A friendly reminder needs to be given to the panelists that answers should be crafted in such ways that it is benefiting the underclassmen audience. It seemed to lag on during some parts when panelists were giving specific details regarding only their organization

-Out of the panel audience, we had 5 members attend Open House, and they all seemed like good candidates.

-Use a swipe in system because some learning communities were asking about it

-The event needs a lot more promotion! If we can get more people to push the word and explain the benefits of the panel, I think it could be really successful.

**Effort level: Medium (since quick turn around)**

**Impact: Ehhh, good for the collaboration could be better for recruiting (next year though!!!)**