

Financial records (treasurer)  
Status reports on current and continuing projects (president/committee chairs)  
Evaluations of previous projects (president or secretary)  
Meeting minutes and agendas (secretary)  
Historical records of organization (president, secretary, or historian)  
University handbooks

**Working with New Officers:**

Share effective leadership qualities and skills  
Share problems and helpful ideas, procedures and recommendations  
Go over reports containing traditions, ideas, completed projects, concerns, loose ends,  
ideas that came up that were never implemented  
Go through organizational and personal files  
Acquaint them with office surroundings  
Meet together with the faculty advisor  
Introduce them to important campus personnel

**Old/New Officer Retreats (held right before new officers take over):**

Hold the retreat in a get-a-way location, so participants won't be distracted or disturbed.  
Be sure to have food and beverages on hand.

Sample schedule:

Icebreakers (advice and comments exercise)  
Evaluation of year's events by outgoing officers  
Officer exchanges-pair up to distribute and discuss position responsibilities  
Goals examination/Report by outgoing officers  
Old officers depart, leaving new officers to discuss the coming year:  
Icebreakers  
Policy, Constitution, Bylaws review  
Expectations of one another  
Theme/Mission development  
Review goals, formulate objectives, and create an action plan for each goal  
Budgeting  
Schedule events for the coming year  
Motivational closing



## **OFFICER TRANSITION**

The transition of leadership for your organization can be smooth or a complete disaster, and may determine the effectiveness of the group for years to come.

### **A Smooth Transition is:**

- The responsibility of both the outgoing and incoming members
- A way to help the group avoid starting over or starting from scratch each year
- A transfer of significant organizational knowledge
- A sense of closure for the outgoing members
- A utilization of the valuable contributions of experienced leaders
- A time for the new leadership to absorb the expertise of the outgoing members
- A great opportunity for outgoing leaders to evaluate the year
- An orientation process for new leaders
- The leadership changeover period
- A time for incoming leaders to ask questions and outgoing leaders to give advice
- An outgoing leader's last chance to say "I wish I had done this..."

### **Specific Information to Give New Officers:**

- Constitution and Bylaws
- Position descriptions of officers and membership
- Description of committees
- Resource or contact list of important people
- Listing of basic annual procedures (reserving meeting rooms, requesting office/storage space in Hunt Union, etc)
- Organizational member list
- Calendar of annual events (rough estimate of what happens each month)
- Philosophy, mission or purpose statement of organization
- List of goals for organization
- List of expectations of members
- Handouts on appropriate topics (stress management, parliamentary procedure, etc)