

# *Officer Transition*

## Agenda

### Building on the Past:

- Outgoing and Incoming Officer meeting
- Binder Review (look at list of what should be included)
- Evaluation! Outgoing officers: Talk about what they learned, what they had to deal with, and what they wish they had known. What were their accomplishments? In what areas could there have been improvement?
- Items to cover: the simple stuff! Office procedure, phone numbers, website, any passwords you may have, events or initiatives you have already committed to, etc.

### Working in the Present:

- Transition Meeting Agenda
- Building your team
- Expectations
- Prioritizing: what needs to be done now?
- Review, create and update clear job descriptions

### Planning for the Future:

- Recognition checklist
- Goal setting and planning
- Set clear goals and objectives for yourself and a tentative one for the organization
- Evaluations

### On-Going Transition Tips to Remember Throughout the Year:

- Create and keep clear files and officer binders
- Assessment of programs, projects, and general initiatives
- Be sure to leave information. Letting someone start from scratch means that all the hard work you have done will be meaningless!

### Additional Information:

- Utilize your advisor and other available resources
- Work together! Form collaborative bonds with other organizations on campus

## *There Are Five Main Parts to "Passing on the Torch"...*

- 1) Nominations
- 2) Elections
- 3) Transitions
- 4) Awards and Recognition
- 5) Goal Setting and Planning

### *Things to Do Before Leaving Office...*

**Try to replace yourself in the organization.** Look for people with leadership qualities that stand out, such as honesty, a vision, open-mindedness, ethics, good judgment, bi-partisanship, knowledge, enthusiasm, and a capacity to listen.

**Assemble your office binder.** Each binder should contain all important materials and documents from the past year. The outgoing officer should "clean out" the binder-archive material that is not useful anymore but still of value to the organization. Remove personal items, make sure everything is in order, and replace important resources from the binder.

**Conduct officer transition.** All new and old officers should meet as a group and discuss the previous year. This will provide a solid foundation and a forum to discuss information, goals, progress, the status of the organization, resources, leadership, and expectations.

**Meet with your successor one-on-one.** This is probably the single most important step! The new officer can review the entire job and do an in-depth analysis of the position. This is a great time to ask questions, take notes, and get a feel of the position.

**Allow your successor to shadow you.** Before your job is truly done, it is important to leave your organization better than how you found it. Part of that is ensuring that your successor learns experientially how to handle the position.

**Hold an officer retreat.** It is vitally important that the new leadership has an opportunity to reflect the recent history of the organization, evaluate the progress, and chart the course for the future. This is a perfect time for the group to "step outside the box" and look at themselves objectively.

**Meet with campus administrators and group advisors.** One of the key components of leadership on a college campus is the ability to interact and develop a relationship with the college personnel and advisors. The new officers should make a point to schedule meetings with their advisor and other university administrators to receive advice, ideas, suggestions, and to obtain feedback on the previous year's progress and the goals you are intent on setting. University personnel are highly trained individuals who will be able to assist you throughout the year-it's up to you to utilize them!

# *Transition Meeting Agenda*

## *New and Old Officers Meet as a Group*

### **Review of the Previous Year:**

- Overall Goals
- Major programs and events
- Major problems
- What was accomplished as an Executive Board?
- What was accomplished as an organization?
- Suggestions and improvements
- When are things busiest for the organizations?...for each officer?
- Procedural Plans for each position
- Month by month account of what happened, what was accomplished, etc

### **Loose Ends:**

- I wish we would have...
- Helpful hints to remember as a leader
- Helpful hints to remember in your positions
- Don't forget...
- Look out for...
- In Jan., Feb., etc make sure to do...
- By the end of the semester you should...
- One-on-one meetings (follow handout)
- Review procedural plan month-to-month account

### **Closing Activity: "Things I wish I knew before I became an officer..."**

Using a gavel, each outgoing executive board member should verbally share some thoughts and ideas of how he or she would have done things differently. New officers share the issues they would like to understand better. Gather the group in a circle, and beginning with the outgoing President, share what you wish you would have known. Pass the gavel around. No one can interrupt the person with the gavel.

### **New Officers Meeting Agenda**

- Goal setting
- Individual goal setting
- Budgeting
- Leadership Training
- Awards and recognition
- Present goals to the organization

## *What should be Included in the Officer Binders?*

Each officer should have a binder for his or her position that contains important materials and related documents. Outgoing officers should “clean out” the binder, making sure to file historical documents in the organization’s archives. Incoming officers should make sure that all the information they will need to be successful is within the binder. Think about the position and the specific functions of it. This will be a useful guide in determining what you need.

### **Contents:**

- Constitution and/or bylaws of the organization
- Organization policies and/or membership requirements
- Student Conduct Code and Community Standards
- Officer job descriptions
- Officer and/or committee reporting structure and job descriptions
- Structure of organization
- Agendas or minutes for all the meetings
- Committee reports
- Membership directory or roster, including phone # and e-mail address
  - Current Members and Alumni
- Advisor’s information
  - Both Campus and National
- Outgoing officers contact information
- Any forms pertinent to the organization
- Any useful information received throughout the year (workshops, opportunities, etc)
- Event guidelines
- End of Year/Semester report
- Activity calendar of the past year (highlight annual events)
- Record of activities from the past years (contracts, dates, what you would do same/different)
- Challenges and successes from the past years and suggestions for future
- Goals from the past year, including progress and status
- Reports that contain new traditions
- Ideas, projects, loose ends, and ideas that came up but the organization wasn’t able to accomplish
- CD/DVD of important files

### **Other Resources:**

- Chapter/Member Development and/or New Member Development Program
- Rituals (written down)
- Alumni Database
- Recruitment Plan

## *One-on-One Meeting Handout*

This handout will assist in the officer transition by focusing upon past accomplishments and providing a critique of the year in the office. The report should serve as a supplementary resource in planning for the new officer's term.

Position: \_\_\_\_\_ Name: \_\_\_\_\_ Date: \_\_\_\_\_

List other officers and chairmen you worked with and projects involved.

List specific accomplishments realized during your term in office and the reason for their success.

List any problems or disappointments you encountered as a part of your office and suggest ways of avoiding or correcting them.

List additional materials and sources of information that you found most helpful. Include specific resources, people, faculty, staff, community resources, etc.

Comments on the timetable applicable to your position. Give suggestions for increasing efficiency and effectiveness.

List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

## *Outgoing Officer Evaluation*

Organization: \_\_\_\_\_

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Date: \_\_\_\_\_

Have we developed younger members who will prove to be exceptional and involved?

Will the membership be innovative and creative after we have left? How?

What programs were successful for us?

What was our greatest achievement?

What was our greatest challenge?

What was my personal greatest achievement?

What was my personal greatest challenge?

In five years I hope this organization...

Three goals we would have liked to accomplish:

- 1)
- 2)
- 3)

Three goals we would like our successors to achieve and build upon:

- 1)
- 2)
- 3)

## *Incoming Officer Evaluation*

Organization: \_\_\_\_\_

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Date: \_\_\_\_\_

List (3) things that make you want to run for this position:

List (3) new ideas you have for this position and the organization:

List (3) things you learned from your predecessor:

List (3) important foreseeable problems/concerns you have of your position:

List possible solutions for those items in the previous questions:

List (3) goals you have for yourself in this position:

As incoming \_\_\_\_\_ (position), I promise to ask for assistance of the outgoing officer, president, and advisor when I need help and/or clarification.

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

\_\_\_\_\_  
Date

*Return a copy of this form to the incoming President and Advisor for their reference.*

## *Activities to Help Provide Closure*

### **Last Will and Testament**

Similar to what you may have done in high school. Graduating seniors and outgoing officers “leave” something behind to a younger member. Younger members/group may provide gifts for those departing.

### **Lifesavers**

Cut out enough circles for each person in the group. Cut out a hole in the center and write each person’s name around the hole. At the final gathering, pass these “lifesavers” around and have each person in the group write a message down about how the person contributes to the group or personally touched them.

### **Regrets**

At the final meeting, ask the member to imagine leaving, getting into their cars, and driving home for the summer, while looking back at college. Ask them to imagine what they would regret not having said before they leave. Sit in a group and have each member share what has not been said.

### **Sapphire Gems**

Using construction paper cut out a variety of different shapes (gems, stars, hearts, animals, etc). Create an envelope for each person and tape the envelope to a wall. Have members choose shapes that represent other members and write a note to that person on that shape. Put the shapes into the envelope and have members take them when they leave.

### **Moment Book/ Journal**

Purchase a small notebook or journal that represents the group. Have each member describe in detail the most important moment of the year that they remember.

### **Paint a...**

Find a place that can be used as a memory wall/quilt/sheet. Allow graduating seniors/outgoing members to paint a brick/square to commemorate and memorialize their membership in the group. Allow the wall/quilt/sheet to grow throughout the years. Keep the object in public view year round.

### **Paper-Plate Awards**

Have outgoing members come up with awards for each member of the organization that meant something to them that was funny or indicative of that member; could be enhanced to an “Awards Show” with a nickname like the “TACy’s”.

### **Bookmarks**

Find a quote that describes people that have contributed to the group. Write the quote on cardstock and decorate it. On the back, write how that person impacted the organization and its members.

# Yearly Calendar

Write down important things that are needed to be done during each month for your position

January

February

March

April

May

June

July

August

September

October

November

December

SUNY Oneonta  
Inter-Greek Council  
Chapter Officer Transition Meeting

November 13, 2009



Presented by:

**Jason Allen**, *Greek Intern*

**Angie Eichler**, *Greek Advisor*

**Samielle Goldman**, *IGC Sorority Recruitment Chair,*

*ΠΔΧ President and Greek Intern*

**Brendan Sherlock**, *IGC President*