Executive Officer Transitioning Guidelines

Good officer transitions are important to the continued operation and success of student organizations. It helps minimize confusion, gives outgoing officers a sense of closure and provides incoming officers a foundation of knowledge.

You should think of your transitions as a partnership between the incoming and outgoing Officers, as well as the incoming and outgoing Executive Boards.

Outgoing Officers preparing to transition out of this position:

*Preparing to transition out of a position and bringing a new member into your role is a culminating moment for your Executive Board membership! As an Executive Officer, we know you want to leave a legacy for your student organization, and your legacy will continue with how well you transition this new member into the role you’re vacating. Follow this step-by-step timeline as you begin and complete your transition.*

1. Keep ongoing records of happenings and changes during the year
   1. Ex. Awards won, Meeting Minutes, Organization Calendar, etc.…
2. Reflect on this last year, write a letter to your incoming officer
3. Update documents to include any changes from the year
   1. Ex. Important Contact List, Organization’s Constitution, Bylaws & Mission, etc.…
4. Collect all physical artefacts to pass down to the incoming officers
   1. Ex. Tri-Fold boards, Organization Plaques, etc.…
5. Revise Officer & Committee position descriptions to reflect current roles
6. Collect all the usernames and passwords for relevant accounts
7. Review yearly Calendar & add important events with descriptive feedback

Outgoing Officer Reflection:

* During the year, I enjoyed this about my position the best…
* The events we host are successful because…
* The events we host can improve by…
* The most important task I performed in my role was…
* The person who helped me the most was...

Things Incoming Officers need:

* Descriptive & Accurate Position Descriptions
* Outlines of any Committees your organization uses
  + Committees are made up of general members and are effective in keeping projects successful
  + What are the committees?
  + How do they form? Who is on them?
  + What do these committees do?
  + Traditionally, we have done X projects with these committees…
* Physical Artefacts (Ex. Tri-Folds used for marketing, Organizational Awards, Pamphlets used year-round, etc…)
* Contact List (Advisor, Important Alumni, Stakeholders, etc…)
* Meeting Minutes
* Financial Updates (Budget for past year, etc…)
* A communication plan between all the new Executive Officers
* Marketing Plans
* Event Calendars
* Information about programming & operating budgets through Ohio State
* Coca-Cola Retreat Grant information

Important things to do:

* Schedule Officer Transition Meetings
* Your president needs to update Officer Roster on Management System
* Update Alumni Roster
* Change the Bank Account information to the new officers
* Complete Registration Requirements in your window
* Write a letter to your incoming officer, include some of the pieces of advice you’ll share with them during the meeting
* Share access to your Buckeye Box, your One Drive, etc…
* Introduce incoming officers to your student organization success coach

Incoming Officers prepare to join the Executive Board:

* List of questions for the Transition Meeting
* Engage in some reflection about what brought you into this position
* Review the position description
* Create a list of questions to ask during your meeting – really use this time to learn from your outgoing officer
* Create a list of things you want to do with this position and some ideas about how to get them done
* List out some of the potential resources you know of that will help you with this position
* Think about who else on the Executive Board will be an asset to your success in this position
* Contact the Advisor to introduce yourself and ask any relevant questions

Incoming Officer Reflections:

* My goals for this position are…
* I think I’ll be best at this part of this position…
* I might struggle with this aspect of this position…
* My biggest strength I’m bringing to this position is…
* I hope I grow in this way…
* I am so excited to work on this project…
* The part of my life that most prepared me for this position is…
* This position might help me get to this place in my professional life…
* Is there something I should be asking…

Transition Meeting:

* Go over job description in detail
  + Is anything missing from this job description?
  + What was your main priority during the year?
* On going projects
  + Give context - where you are in this process, what still needs to be completed and what is in the works right now?
* Share contact information of important people
  + Advisor
  + Other officers
  + Stakeholders
  + University employees who help the most
* Develop Communication method between the officers
  + How will they reach you if they have an urgent question?
  + Who should they look to if they are confused?
* Review important systems
* Review financial standing of organization
* Answer questions they have about the position

Completing the Transition:

* Once you’ve held a few meetings between the incoming and outgoing officers, you will need to rely on your communication plan
* If you have a shadowing period in place between incoming and outgoing, have a deadline for when that will end and be clear about that
* Once the deadline is upon you, you will enact your communication plan
* You will have handed off all the passwords, shared things on your iCloud, etc…make sure that they have all the information they need to be successful
* Trust that you’ve done a good job and that they will be successful!