**Transition Meeting(s)**

*Communicative and honest transition conversations between incoming and outgoing officers of your organization promote organizational efficiency, success and longevity. Having a transition meeting allows for these transition conversations to take place - it gives you a time to reflect on the ways in which your leadership skills changed as a result of your time in your position and offers the incoming officer support as they transition into the role.*

**Transition Timeline:**

Your transition begins the moment a new officer is elected to this position. Once this happens, the incoming and outgoing officer should make a point to contact the other person in order to schedule a meeting. Schedule your meeting for as soon as you can to have a smooth transition process – the earlier you can do it, the better. Once your meeting is scheduled, take a look at what you should do before the meeting and do those things. After you prepare for the meeting, you’ll decide together about how best you’ll continue your transition.

**Transitioning:**

Both the incoming and outgoing officers are responsible for the success of this (these) meetings. Here are some things that the outgoing officer should do before the meeting(s):

* Perform an in-depth review of the position description
* Update position description to include a current listing of the tasks for which they are responsible for in this position
* Engage in self-reflection about your time in this position
* Review a list of resources you used in your position (even if it was only once!) with the incoming officer—this can help them perform their job efficiently from the beginning
* Generate on-going projects that won’t be completed before you transition out of your position
* Create a list of contacts with them (Ex. “As the Fundraising Chair for Brutus Buckeye Club, I talked with the Treasurer and the President the most frequently”)
* Contact your advisor and verify any information they think needs to be shared with the incoming officer

Here are some things to reflect on before your meeting:

* My favorite part of this position was…
* My least favorite part of this role was…
* To do this role successfully, I had to…
* I made this mistake…
* Here is what I learned from that mistake…
* I was most successful in this role when I...
* I wish I’d known this in the beginning of my role…
* To be successful, you will need to…
* The most important part of this position is…
* My priority was…
* I was busiest during Spring/Fall Semester…
* Three things you’ll need to do right away…
* I tried to do this in my time during this role…
* The reason I think I was successful is because…
* I wish I’d known this before this position…

Here are some things that the incoming officer should do before the meeting(s):

* 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

Here are a few reflection questions to consider:

* I’m most excited about this part of this position…
* 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…

**Think about Transition Meetings this way:**

Officer transitions should not begin and end with this single meeting. You might find it best to include a period of Executive Officer shadowing during your transition period—this can be a time for the incoming and outgoing officers to learn together how to communicate with one another and a real time showcase of the roles and responsibilities the incoming officer will face. Another great example of a transition exercise is to co-lead meetings between incoming and outgoing officers—this gives the outgoing officer a change to role model meeting or project behavior and the incoming officer the chance to begin developing relationships with the incoming Executive Board. Though these are just two examples of officer transition exercises, you should consider what works best for your student organization. Remember, incoming officers want to make things better and outgoing officers want to leave a legacy of greatness behind them. Transitions are the perfect way to do that!

**During the Transition Meetings:**

Both the incoming and outgoing officers should take notes—keep a record of the questions you asked, the answers you gave, etc… Remembering who said what can be crucial in a few months when your student organization gets rolling! Your Transition Meeting(s) should be split up into the following sections. Speaking of…

**Transition Meeting Template:**

**[Date & Time]** Keep track of when you get together and who says what

**[Position Description Review]** Together, review the position description

**[Position Resources Shared]** Together, look at the resources this position needs

**[Incoming Officer Questions]** The incoming officer undoubtedly has questions, share them during this time of the meeting(s)

**[Outgoing Officer Advice]** The outgoing officer should share advice & guidance

**[Advisor Notes]** What things does your advisor have to say about this position?

**[Communication Plan]** How will the two of you communicate?