Officer Training and Transition 101

The key to a successful transition is new officer orientation. Outgoing officers and advisors should plan either several orientation workshops or an organizational training retreat to provide information to the incoming officers to continue the success of the organization.

**Topic to Discuss at Transition Meetings**
- Historical perspectives of the organization
- Constitution and by-laws
- Policies and procedures
- Officers job descriptions’ / background information
- Meeting minutes, historical records
- Previous years’ goals, projects, and activities
- Preview years’ budget
- Financial records
- Suggested changes
- Roles and responsibilities
- Resources of contact lists of important people
- Roles and expectations of officers and advisor for the coming year
- Leadership/skill-building sessions - can be facilitated by advisors, outgoing officers, or outside resources and may include: delegation, recruitment ideas, communication, etc.
- Always ask for feedback and questions
- Passwords, Copy Codes, email address information, etc.

**Other Helpful Hints:**

**Money**
Treasurers and presidents will need to meet with the new officers to change over bank information - especially permission for the new signers if your organization has an off campus bank account at the local banks, PIN numbers, records of budget and finances, and checks. Be sure to lookout for funding board dates and deadlines for early Fall.

**Officer Duties**
New officers sometimes don’t know where to begin. Encourage your officers to create a quick to do list for the new officers, including advice and suggestions. See attached handout for sample form. It is also a good idea to pass along manuals, folders, and documents that were used, both electronic and hard copy.

**Create a contact sheet**
Collect names, email addresses, and phone numbers of new and old officers so the executive board can continue to communicate over the summer to help with forwarding of information.

**Important Dates**
Be sure to let your new officers know of important dates and deadlines.
Officer Transition Worksheet – to be completed by each officer position
Complete this form, attach it to any documents and/or folders that you may have, and pass it along to the new officer.

Tasks you did in your position:
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* 
* 
* 
* 

What you would not do again and why:
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* 
* 
* 

Events, programs, meetings that went well and why:
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* 
* 
* 

Advice you have for this person in his/her new position:
*First and foremost, get to know Student Activities Center, located on the third floor of the Union, above the SGA offices. You can also call at 644-6673 for help. 
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Describe other important areas new officers would to continue (traditions, partnerships, co-sponsorships, fundraisers, themed weeks, etc)
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This document was created to help organizations with transition of its officers. If your organization and/or new officers would like help in any capacity, please contact Student Activities Center at 850-644-6673.