



# Officer Transition Manual

For KU's Registered Student Organizations

**Student Involvement and Leadership Center**  
*Contributing to Student Success*

Revised 07.30.08

## Why Transition?

Tired of reinventing the wheel? Often times organizations spend little time in the transition stage and consequently new officers spend too much of their time acclimating to their newly-elected position. A smooth officer transition will not only improve the abilities of newly-elected officers, it will decrease the amount of time each officer spends “learning” his position. Through an effective transition, the incoming officers will be able to learn from the experience of the previous officers and offer continuity and continued growth for the organization.

The transition of leadership for your organization is the single most important event in a viable student organization’s year. It 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 organization **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
- A time for the incoming leaders to ask **questions** and the outgoing leaders to offer **advice**
- An outgoing leader's chance to say "**I wish I had done this .....**"

## What is an Officer Transition Meeting/Retreat?

A retreat or meeting away from the organization is a necessity before officers turn over. It provides the outgoing officers the opportunity to ensure that the programs, policies, and success of your term do not diminish with the next administration. Furthermore, it provides the incoming officers the opportunity to learn what his/her responsibilities are and prevents the new officer from having to reinvent the wheel.

An officer transition meeting/retreat can be:

- A meeting with the newly-elected and outgoing officers (all together)
- A meeting between the newly-elected and outgoing officers (one on one)
- A retreat during which newly-elected and outgoing officers meet for one day (or just a morning or afternoon), while the newly-elected officers meet for a second day to brainstorm goals
- An informal information gathering session during which younger officers gather and record information and knowledge from outgoing officers/seniors

So where do you begin? Here are a few thoughts to keep in mind when planning a retreat or meeting.

- Request that all outgoing and incoming officers be present for the transition meeting/retreat. Provide at least 2-3 weeks notice for all officers.
- Contact your organization's advisor and be sure he/she and the advising team are aware of the date. Provide at least 2-3 weeks notice for all advisors.
- Reserve a room on campus or elsewhere at least 3 weeks in advance.
- Will there be any budgetary concerns? If so, be sure to speak with the treasurer. Will you serve lunch? Snacks? Any office supplies?
- What will the length of the retreat be? Will goal setting be an aspect of the transition retreat?

## Preparation for the Meeting/Retreat

### I. Officer Notebooks

One of the most important aspect to a successful transition lies in having a thorough officer notebook (or another option is to do a similar thing electronically on a CD or flash drive) An Officer Notebook should be a three-ring binder that includes the following information:

- a. The corresponding officer manual for the position
- b. Copy of the organization's constitution & bylaws
- c. Copy of officer responsibilities as stated in the constitution & bylaws
- d. All current forms relative to the office
- e. Record of activities over the past year
- f. Calendar of the past year
- g. Recommendations for the coming year
- h. Resources relevant to the office
- i. Other pertinent "campus" information
- j. A letter to the next officer.

At the end of each term, officers should update and revise the information in their notebook and pass along the notebook to the next incoming officer. If done correctly the Office Notebook can provide serious longevity to the position.

Before the Officer Transition Meeting Retreat, instruct your outgoing executive officers to update, add to, and revise their notebook. If your current executive officers were never given a notebook, it's never to late to start! Start making one from scratch right now!

### II. Outgoing Officer Worksheets

Before the Meeting/Retreat, request that outgoing officers review their terms and fill out the *Outgoing Officer Transition Worksheet* (see appendix A) prior to the retreat/meeting. Potential questions to address include:

- a. What problems or stumbling blocks did you encounter as an officer?
- b. How were these problems or stumbling blocks dealt with?
- c. What aspect(s) of the term went really well?
- d. What recommendations do you have for the incoming officer?
- e. What unfinished business must be addressed?

Have the outgoing officers bring their completed worksheets (see appendix A) to the meeting/retreat.

## Preparation for the Meeting/Retreat (cont.)

### III. Incoming Officer Worksheets

Before the Meeting/Retreat, request that incoming officers think about their upcoming terms and fill out the *Incoming Officer Transition Worksheet* (see appendix B) prior to the retreat/meeting. Potential questions to address include:

- a. What is the purpose of my office?
- b. What are my responsibilities?
- c. How can I improve what the former officer accomplished?
- d. What new/old programs do I plan to utilize during my term?
- e. What do I want to accomplish in the short term (3 goals)? What are two or three action items I must accomplish to complete these short term goals? What is the projected date of completion for these goals?
- f. What do I want to accomplish in the long term (3 goals)? What are two or three action items I must accomplish to complete these long term goals? What is the projected date of completion for these goals?
- g. What were your greatest challenges in this office?

Have the incoming officers bring their completed worksheets (see appendix B) to the meeting/retreat.

## Sample Agenda for Officer Transition Meeting/Retreat

1. Introduction/Overview of Agenda
2. Team Builder/Ice Breaker
3. One-on-one meetings between old and new officers  
*Outgoing officers pair up with their respective incoming officer to:*
  - *Give incoming officer the officer notebook and review job responsibilities - instruct new officer on best practices of the position*
  - *Outgoing officer shares his/her completed Outgoing Officer Worksheet (see appendix A) with the incoming officer and discusses his/her answers to each question with the new officer*
  - *Incoming officer shares his/her completed Incoming Officer Worksheet (see appendix B) with the outgoing officer and discusses his/her answers to each question with the outgoing officer, and received feedback from the outgoing officer.*
4. Return to a large group and have a lesson on SMART Goals  
*See Appendix C for SMART Goals*
3. Officer goal setting (short and long term)  
*Outgoing officers pair back up with their respective incoming officer to work together to develop short and long term goals, using Appendix C, and keeping in mind SMART Goal setting techniques.*
4. Officers report their goals to the group  
*Return to large group to have each incoming officer report out their goals for the coming year*
5. Committee of the Whole or Roundtable discussion  
*Have the entire group go around in a circle and one at a time share their thoughts/feelings of the moment. What pieces of advice to the outgoing members have? What concerns, questions, excitements do the incoming members have?*

## GOAL SETTING

1. **A goal**
  - is a desired future condition.
  - tends to be long term, but may be short term as well.
  - is broad in focus.
  - is expressed in either quantitative or qualitative terms.
  
2. **Why are goals important?**
  - Goals are guides for action, and it is through group goals that the efforts of group members are planned and coordinated.
  - Conflicts among members are resolved on the basis of what assists the organization in achieving its goals.
  - Setting goals gives you an opportunity to review and evaluate what has been done and discuss problems.
  - Goals provide a benchmark against which progress can be assessed.
  - Goals provide targets toward which efforts can be directed.
  - Goals are the motivating force in the behavior of group members. Without motivation, the group takes no action to achieve its goals.
  
3. **“The good goal test”**
  - Are your goals stated in specific terms?
  - Are your goals realistic, attainable and meaningful to your organization?
  - Are your goals challenging enough?
  - Are your goals task-oriented?
  - Are your goals measurable so you know when you’ve accomplished them?
  - Was there group participation in setting the goals?
  
4. **Remember, if the goals are accepted, understood and desired by the organization, they can direct, channel, motivate, coordinate, energize and guide the behavior of group members. Share your goals with others!**
  
5. **Steps in goal setting**
  - A. *Brainstorm*
    1. Allow ideas to start flowing.
    2. Discuss with others what you would like your office to accomplish through your office.
    3. There is no such thing as a dumb idea or dumb question. Just say what is on your mind.

## GOAL SETTING (cont.)

- B. *Prioritize*
1. Place goals in order of importance.
  2. Remember to set a few goals to which you, the officer, will commit.
  3. Understand that too many goals can become unachievable.
- C. *Develop a quality action plan*
1. Identify the steps needed to accomplish the goal.
  2. Put the steps needed to accomplish the goal in order.
  3. Be sure your goals are incremental and measurable.
  4. Set a deadline for each step to be accomplished.

## SMART GOALS

*Goals need to be SMART. They need to be:*

**S** - specific, significant, stretching

**M** - measurable, meaningful, motivational

**A** - agreed upon, attainable, achievable, acceptable, action-oriented

**R** - realistic, relevant, reasonable, rewarding, results-oriented

**T** - time-based, timely, tangible, trackable



## Characteristics of an Exceptional Executive Officer

It is an honor to be elected as an officer of your organization. An officer must not only possess superior organizational, communication, and managerial skills, he/she must assume great responsibility and provide consistent, inspired and *principle-centered leadership* for other group members.

Most importantly, he must possess the ability to lead by example, in attempts to gain the respect and confidence of his/her fellow group members. Self-discipline will enable you to hold others accountable for their actions. After all, if you as a leader do not pay your bills, come prepared to meeting, and act responsibly in a social atmosphere, why should the members? Other traits of an exceptional leader include:

**Proactive vs. Reactive**—The exceptional leader is always thinking three steps ahead. Working to master his own environment with the goal of avoiding problems before they arise.

**Flexible/Adaptable**—How do you handle yourself in unexpected or uncomfortable situations? An effective leader will adapt to new surroundings and situations, doing his best to adjust.

**A Good Communicator**—As a leader, one must listen...a lot! You must be willing to work to understand the needs and desires of your membership. A good leader asks many questions, considers all options, and leads the organization in the right direction.

**Respectful**—An officer should show respect to those who elected him to his position. Showing others respect will ultimately bring him respect.

**Confident**—Be proud of your organization and let your pride emanate to others within and outside of the group.

**Enthusiastic**—Excitement is contagious. When a leader is motivated and excited about the organization, the group will follow his/her lead.

**Open-Minded**—Work to consider all options when making decisions. A strong leader will evaluate the input from all interested parties and work for the betterment of the whole.

## Characteristics of an Exceptional Executive Officer (cont)

**Resourceful**—As a leader you must utilize the resources available to you and the organization. Your advisors, the staff in the Student Involvement and Leadership Center, and other members and officers of the KU community are all here to help you. Use them!

**Rewarding**—An exceptional leader will recognize the efforts of other officers/members and positively reinforce those actions. We all enjoy being recognized for our actions!

**Well Educated**—Knowledge is power. Work to be the officer who is well educated on the organization, the Student Involvement and Leadership Center, campus, and community policies and procedures. Further, your knowledge of issues and information within the organization will only increase your success in leading the group.

**Open to Change**—A leader will take into account all points of view and will be willing to change a policy, program, or tradition that is out-dated, or no longer beneficial to the organization as a whole.

**Interested in Feedback**—How do your members feel about your office? How can you serve the members of the organization better? These are important questions that a leader needs to constantly ask.

**Evaluative**—Evaluation of events and programs is essential for an organization to improve and progress. An exceptional officer will constantly evaluate and change programs and policies that are not working.

**Organized**—Are you prepared for meetings events and confident that other officers are prepared and organized as well?

**Consistent**—As an officer, you need the confidence and respect of the organization members. Confidence and respect cannot be attained without your leadership being consistent. Members must have confidence that their opinions and thoughts will be heard and taken into consideration.

**Delegator**—An exceptional leader realizes that he cannot accomplish everything on his own. He will know the talents and interests of his members, thus delegating tasks accordingly. Be sure to be inclusive of all members.

## Appendixes

### (Appendix A)—*Outgoing Officer Transition Worksheet*

a. What problems or stumbling blocks did you encounter as an officer?

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b. How were these problems or stumbling blocks dealt with?

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c. What aspect(s) of the term went really well?

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d. What recommendations do you have for the incoming officer?

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e. What unfinished business must be addressed?

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f. What would you have done differently?

**(Appendix B)—*Incoming Officer Transition Worksheet***

a. What is the purpose of my office?

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b. What are my responsibilities?

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c. How can I improve what the former officer accomplished?

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d. What new/old programs do I plan to utilize during my term?

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e. What do I want to accomplish in the short term (3 goals)? What are two or three action items I must accomplish to complete these short term goals? What is the projected date of completion for these goals? (see Appendix C)

f. What do I want to accomplish in the long term (3 goals)? What are two or three action items I must accomplish to complete these long term goals? What is the projected date of completion for these goals? (see Appendix C)

**(Appendix C)—Incoming Officer Transition Worksheet, Goal Setting**

|  |          |
|--|----------|
| <b><u>Short-Term Goal 1</u></b>                | _____    |
| <i>Action items to complete Goal 1</i>         | 1. _____ |
|  | 2. _____ |
|  | 3. _____ |
| <i>Projected Date of Completion for Goal 1</i> | _____    |

|  |          |
|--|----------|
| <b><u>Short-Term Goal 2</u></b>                | _____    |
| <i>Action items to complete Goal 2</i>         | 1. _____ |
|  | 2. _____ |
|  | 3. _____ |
| <i>Projected Date of Completion for Goal 2</i> | _____    |

|  |          |
|--|----------|
| <b><u>Short-Term Goal 3</u></b>                | _____    |
| <i>Action items to complete Goal 3</i>         | 1. _____ |
|  | 2. _____ |
|  | 3. _____ |
| <i>Projected Date of Completion for Goal 3</i> | _____    |

|  |          |
|--|----------|
| <b><u>Long-Term Goal 1</u></b>                 | _____    |
| <i>Action items to complete Goal 1</i>         | 1. _____ |
|  | 2. _____ |
|  | 3. _____ |
| <i>Projected Date of Completion for Goal 1</i> | _____    |

|  |          |
|--|----------|
| <b><u>Long-Term Goal 2</u></b>                 | _____    |
| <i>Action items to complete Goal 2</i>         | 1. _____ |
|  | 2. _____ |
|  | 3. _____ |
| <i>Projected Date of Completion for Goal 2</i> | _____    |

|  |          |
|--|----------|
| <b><u>Long-Term Goal 3</u></b>                 | _____    |
| <i>Action items to complete Goal 3</i>         | 1. _____ |
|  | 2. _____ |
|  | 3. _____ |
| <i>Projected Date of Completion for Goal 3</i> | _____    |

**BE SURE YOUR GOALS ARE SPECIFIC!**

## *The Bridge Builder*

An old man, going a lone highway,  
Came at the evening, cold and gray,  
To chasm, vast and deep and wide,  
Through which was flowing a sullen tide.  
The old man crossed in the twilight dim;  
The sullen stream had no fears for him;  
But he turned when safe on the other side  
And built a bridge to span the tide.

"Old man," said a fellow pilgrim near,  
"You are wasting strength with building here;  
Your journey will end with the ending day;  
You never again must pass this way;  
You have crossed the chasm, deep and wide --  
Why build you the bridge at the eventide?"

The builder lifted his old gray head:  
"Good friend, in the path I have come," he said,  
"There followeth after me today  
A youth whose feet must pass this way.  
This chasm that has been naught to me  
To that fair-haired youth may a pit-fall be,  
He, too, must cross in the twilight dim;  
Good friend, I am building the bridge for him."

*~ Will Allen Dromgoole*

*If you need any additional help planning your Officer Transition, please contact the **Student Involvement and Leadership Center** at 785.864.4861 or email us at [orgs@ku.edu](mailto:orgs@ku.edu).  
We're here to help!*