

American University
**Student
Activities**
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**STUDENT LEADER
TRANSITION GUIDE**

Spring 2011

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When all is said and done, your ability as a leader will not be judged by what you achieved personally or even what your team accomplished during your tenure. You will be judged by how well your people and your organization did after you were gone. Your lasting value will be measured by your succession.

— John Maxwell, *Leadership* 101



Outgoing Officer Guide

Outgoing Officer Check List

1. Organize all notebooks, binders, files, and electronic document folders
2. Finish all necessary correspondence (letters, e-mails, phone calls, etc.)
3. Develop action plans and timelines for new officer transition, including but not limited to:
 - ★ Necessary meetings attended and chaired by the officer
 - ★ Important tasks
 - ★ Introductions to key people (relationship building)
4. Complete Outgoing Officer Information Sheet(s) (*enclosed*)

Important Information to Pass on in Your Officer Manual

A binder/electronic copies of the following recommended resources should be compiled and given to the incoming officer:

People (Contact Information)

- ★ Outgoing person's contact information (in case there are questions when the new person takes office)
- ★ Other student organization contacts (clubs, fraternities/sororities, RHA, etc.)
- ★ AU staff contacts (faculty/staff/alumni advisor, Student Activities advisor, etc.)
- ★ Vendor contacts

Documentation

- ★ Position description/responsibilities of the position
- ★ Calendars/Timelines
- ★ Sponsorship information (i.e. what organization, event, etc.)
- ★ Electronic copies of posters/flyers/t-shirt designs
- ★ Meeting agendas
- ★ Meeting minutes
- ★ Templates for forms/letters
- ★ Budgets from prior years
- ★ Financial documents (i.e. receipts, invoices, etc.)
- ★ Asset list (i.e. tables, chairs, supplies, etc.)
- ★ Electronic copies of all important documents (i.e. constitution, policies, procedures, etc.)
- ★ Login information/password for OFAS, organization email accounts, etc.

Key Activities, Initiatives, and Events

- ★ Information for any past vendors used (i.e. caterers, transportation services, printers, t-shirt companies, etc.)
- ★ Descriptions of past events, checklists, plans, etc.

Words of Wisdom

- ★ Mistakes you made that could have been avoided
- ★ Advice you wish you had before assuming office last year
- ★ Questions the new officer may have



Outgoing Officer Worksheet

TO BE COMPLETED PRIOR TO TRANSITION MEETINGS. Please think through and respond to the following questions regarding your responsibilities. This information will be helpful for your successor.

1. What I liked most about my position...
2. What I liked least about my position ...
3. The most difficult decision I made was...
4. What I could have done to make the experience better...
5. Obstacles to performing my position responsibilities effectively were...
6. Things that helped me better handle my position were...
7. Things I wish I'd known before I took office were...
8. One University policy that I really had trouble with was...



Maintaining Continuity: Transition Questions

Outgoing Officers

1. What do you perceive to be our organization's objectives or goals (short-term and long-term)?
2. What do you consider to be the responsibility of your office?
3. What do you wish you had done, but did not?
4. What did you try that did not work? Why did it not work?
5. What problems or areas will require attention within the next year?
6. Who was the most helpful in getting things done? (Who were good resources?)
7. What should be done immediately in the fall?



Outgoing Officer Major Accomplishments

Accomplishment	Barriers/Limitations	Resources Used	Solutions to Problems	Still to be Done



Incoming Officer Worksheet

TO BE COMPLETED PRIOR TO TRANSITION MEETINGS. Please think through and respond to the following questions. This information will be helpful as you begin planning for next year.

1. What position-specific things do I want to know about (i.e. forms, timelines, duties, etc.)?
2. Things I should or want to do over the summer...
3. Other students, faculty and staff I should get to know...
4. Resources and services I need to know about...
5. Things I need to know about working with my faculty/staff and/or Student Activities advisor...
6. Other questions I want answered...
7. One University policy/procedure that I really want to know about...



Maintaining Continuity: Transition Questions

New Officers

1. What do you perceive to be your organization's objectives or goals (short-term and long-term)?
2. What do you consider to be the responsibilities of your office?
3. What are your expectations of yourself in this office?
4. What expectations do you have of the rest of the Executive Board?
5. What expectations do you believe others have of you?
6. What problems or areas will require your attention in the next year?
7. What should be done immediately in the fall?
8. Who do you anticipate will be the most helpful in getting things done?
9. Write down one specific problem you anticipate encountering during your term and how you will go about overcoming it.



Incoming Officer Goal Setting

What I Would Like to Accomplish	Barriers/Limitations	Resources I Can Use	Questions to be Answered	Why I Want to Do This



One-on-One Meeting

The following will help guide your conversation by focusing on past accomplishments and providing a critical evaluation of the year in office.

Agenda

- ★ Responsibilities of the position
- ★ Timeline for completing duties of the position
- ★ Unfinished projects
- ★ Important resources and contacts
- ★ Mistakes the outgoing officer made that could have been avoided
- ★ Advice the outgoing officer wishes s/he had been told before taking office last year
- ★ Questions from the incoming officer
- ★ Outgoing officer contact information (in case more questions arise)

Questions to Consider

- ★ What specific accomplishments were realized this year and why were they successful?
- ★ What problems or disappointments did you encounter this year and how could they be avoided or corrected?
- ★ What supplemental materials or resources did you find most helpful (i.e. contacts, websites, campus partners, etc.)?
- ★ How can the timeline for the position be made more efficient and effective?

Adapted from a transition guide created by Leah Kreimer and used by RHA

