Leadership Transition Resources

Passing the Torch:
The Legacy of Leadership
Agendas for Transition Meetings

Meeting 1: Individual Outgoing and Incoming Officers

Prior to the meeting review and complete Outgoing Officer and Incoming Officer Transition checklists

- Try to transfer as much information as possible either electronically or on paper. This is critical if the Outgoing Officer is graduating, etc.

- Make sure the incoming officer has a copy of the following items:
  - Copy of Constitution and By-laws
  - Position description of officers and members
  - List of committees and their description
  - Member & officer contact list
  - Contact information of important people/offices on campus
  - List of basic annual procedures and/or calendar of annual events
  - Web page and webmaster information. How do you maintain the site?
  - Mission, philosophy, goals and/or purpose statement of organization
  - Financial records
  - Evaluations of previous and current projects
  - Meeting minutes and agendas
  - Any historical records of the organization

- Look at your calendar from the past year:
  - What were the busy times?
  - What were the down times?
  - How would you have scheduled things differently?

- Look over a calendar for the upcoming year:
  - How can you effectively plan your schedule?
  - Start penciling in ideas of events, etc. if there are certain things that you know you’ll be doing.

- Make Introductions to Resources
  - Schedule time to walk around campus together
  - People to meet:
    - On Campus
    - In the community
    - Other organization leaders

- Review Budgets and Funding
  - What’s the financial status of your organization?
  - Where did your organization get money from?
  - Did your organization apply for Student Government funding and did you receive any?
  - Did you do fundraising? Did it work?
• Review past and future organization events
  o Which events were successful and should be repeated?
  o When should planning start for each event?
  o Which events were unsuccessful? Were they poorly attended or poorly run?
  o How could your organization improve its events?

• Meetings and Organization
  o When were they held? What times generally work?
  o How do you make room reservations?
  o What is a typical week like?
  o What were the most and least challenging experiences?

• Recruitment activities
  o What did your organization do to recruit? What did you do that worked or didn't work?
  o Why did new members stay...or leave?

• The Next Step
  o Make a “Things To Do” List and prioritize it together
  o Exchange contact information so the outgoing officer can be reached for assistance
Agendas for Transition Meetings

Meeting 2: Incoming and Outgoing Executive Council Meetings
Prior to the meeting the outgoing executive council should review and complete the Outgoing Executive Council Evaluation – either individually or as a group. Through this meeting the new officers will be able to learn from the experience of the outgoing officers and offer continuity and continued growth for the organization. A casual, open atmosphere should be encouraged so that the organization can benefit from an honest evaluation of the accomplishments and problems of the previous year.

- At this point, all of the Outgoing and Incoming Officers have had their 1-1 meetings and gone over their own checklists
- Use Meeting 2 as an opportunity to get to know the other new officers and plan goals for the year ahead
- Try to make clear goals and delegate responsibility among the Incoming Officers by the end of Meeting 2

I. WELCOME AND INTRODUCTIONS
A. Help the participants become acquainted.
B. Explain the purpose of the meeting.

II. THE YEAR IN REVIEW
A. Review the group's goals for the previous year.
   1. What did we hope to accomplish?
   2. How well did we do on each goal?
   3. Which goals should be continued?
   4. Which goals should be altered?
   5. Which goals should be dropped?

B. Review programs and activities.
   1. What activities and programs did we sponsor?
   2. How effective was each program?
   3. Did we have a good balance of different kinds of programs?
   4. Did we do any community service activities?
   5. Were the programs and activities consistent with group goals?
   6. Which activities should be continued and which should be dropped?

C. Review membership.
   1. Do we currently have just enough, too few, or too many members (in light of the group's goals)?
   2. How effective were our membership recruitment efforts?
   3. Are the members actively involved in the operation of the club (including decision making, planning, implementing, and evaluating)?
   4. Are members enthusiastic about the group's activities and motivated to work towards the group goals?
   5. Were there adequate opportunities for members to get involved in responsible and meaningful ways?
D. Review officers and organizational structure.
1. Do officers understand their responsibilities and roles within the organizational structure?
2. Did the officers operate as a team or could cooperation between officers be improved?
3. Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?
4. Are the officers "in tune" with the membership? Is there two-way communication (and understanding of members' needs and talents)?
5. How would the general membership evaluate the effectiveness of the officers?
6. How would the officers evaluate the effectiveness of the officers? What could be improved?

E. Review organizational operation.
1. Were the finances adequate for the group's activities?
2. Was the budget managed properly?
3. Were meetings run effectively?
4. Was the frequency of meetings appropriate?
5. Do we have a committee structure? If so, is it working? If not, is it needed?
6. Do we experience scheduling conflicts with other groups or activities?

F. Review faculty involvement.
1. Was our faculty adviser involved just enough, too much, or too little?
2. Were there adequate opportunities for McIntire faculty to become involved in our organization? Did they become involved?
3. Could faculty involvement be improved? If so, how?

G. Public Image
1. How do other groups perceive us?
2. How do we see ourselves?
3. How can we enhance our image?

III. YOUR LEGACY TO NEXT YEAR'S GROUP
A. Currently, what are the major strengths of our organization?
B. What are the major weaknesses?
C. What is the best advice we, as outgoing officers, can give to the new officers?

IV. OFFICER TRANSITION
Have the new officers meet individually with their predecessor (see Meeting 3)

V. WRAP-UP
Pass the Torch in a semi-official ceremony and wish everyone luck!
Agendas for Transition Meetings

Meeting 3: Individual Outgoing and Incoming Officers
Review Officer Transition Checklists and Guides to make sure that all areas have been addressed. In this meeting address any items that are still outstanding or unanswered.

- Even if it's just over email or the phone, try to create an open dialogue between the Outgoing and Incoming Officers

- Based on the discussion at Meeting 2...
  - Are there any unresolved issues or certain items that you need more information about?
  - What are your plans or goals? Does the Outgoing Officer have any other information or tips that might help you?
  - Find out if it's okay to contact the Outgoing Officer in the coming year for assistance where necessary.
Preparing a Transition Notebook

A transition notebook should cover all aspects of an officer's responsibilities and how those tasks fit into the organization's big picture. Recommend that the new officer file "historical" documents in the notebook. The notebook should function as a working tool rather than something to be completed at the end of the year. Add and delete topics so that the notebook is applicable to your organization.

1. Introduction
   a. Table of contents
   b. Contact sheet for new leadership/membership

2. Letter from advisor
   a. Welcome
   b. Role and responsibilities
   c. How to get in touch with him/her

3. Historical documents
   a. Constitution and by laws
   b. Mission statement
   c. Goals and objectives (both met and unmet)
   d. History of organization and committee/program
   e. Job description
   f. Organizational chart for organization
   g. Officer selection process information (and timeline)
   h. Membership recruitment information (and timeline)
   i. College policies and handbook

4. Evaluation
   a. Completed evaluations with detailed recommendations
   b. Two blank evaluation

5. Progress/Status Reports (Year end, Semester end, and/or programs)
   a. Completed progress/status reports
   b. Unfinished project information
   c. Blank progress reports with guidelines for completion. A progress report provides the "working draft" for most of the transition notebook. It should provide the member with an opportunity to write down what is new or different, what has been improved upon, what is in progress, accomplishments, etc.

6. Officer Position
   a. Demographics from current year
   b. Letter from former to new coordinator or officer including
      i. Advice
      ii. What was experienced (what worked and what didn’t work)
      iii. What was improved upon this year
iv. Things to know when getting started  
v. Prioritizing the tasks for the position  
vi. Challenges  
c. Current goals  
d. Bank goals sheet  
e. Detailed timeline  
f. Important names and numbers  
g. Any other information pertinent to position

7. Training information  
a. Agendas, handouts and minutes from past training retreats or meetings  
b. Information on the how-to's of the organization (such as publicity, financial matters, etc.)

8. Organizational information  
a. Calendar of events  
b. Meeting agendas and minutes  
c. Resources  
d. Budget and funding information  
e. Instructions on how to sign on to your organization's electronic mail message group or conference

Adapted from the University of Oregon Leadership Resource Office
Officer Transition
A checklist for outgoing officers

This checklist is intended to provide new officers a complete orientation of their duties and responsibilities that is provided by your organization's outgoing officers. Some ideas will pertain to your organization while other ideas may not be suitable.

A. Information about the organization

___ Review organization's history
___ Review College's Policies and Procedures
___ Review the organization's constitution, by laws and mission statement
___ Review your goals and objectives for the last year

B. Officer's Roles and Printed Materials

___ Review and pass on old records, binders, files, notebooks and correspondence
___ Review job descriptions
___ Review officer's written expectations
___ Review organization's agenda and minutes
___ Review organization's calendars
___ Review organization's status reports for continuing projects
___ Review organization's evaluations for projects, completed
___ Review organization's previous financial records, mailing lists
___ Review your achievements
___ Review your failures
___ Pass on membership list, contracts, addresses, phone numbers, e-mail addresses, etc.
___ Provide financial information such as treasurer's accounts, fundraising information and copies of completed requisitions

C. Officer Introductions

___ Introduce officer to key contact people and provide their phone number
___ Presiding and function in meetings
Outgoing Officer Worksheet

[To be completed before transition meetings and training sessions]

Please think through and respond to the following questions regarding your responsibilities. This information will be helpful to your successor.

7. What I liked best about my job...

8. What I liked least about my job...

9. The most difficult decision I made was...

10. What I could have done to make the experience better was...

11. Obstacles to performing my job effectively were...

12. Aids which assisted me in handling my job were...

13. Things I wish I'd known before I took the job were...
Maintaining Continuity: Transition Questions
Old Officers

**Directions:** Many of these questions are geared toward former, or out-going officers. They should be considered carefully and communicated to the newly elected officer. New officers can use these questions to brainstorm ideas or goals for the upcoming term of office.

1. What do you perceive to be your organization's objectives or goals?

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?
One-on-One Meeting Handout

This handout will assist in officer transition by focusing upon past accomplishments and providing a critique of the year in office. This report should serve as a supplementary resource in planning for the new officer’s term.

Office: ___________________________  Name: ___________________________

Date: ___________________________

1. List other officers / chairmen with whom you worked and the projects involved.

2. List specific accomplishments realized during your term in office and the reasons for their success.

3. List any problems or disappointments you encountered as a part of your office and suggest ways of avoiding or correcting them.

4. List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, university / college officers, community resources, etc.

5. Comment on the timetable applicable to your office. Give suggestions for increasing efficiency and effectiveness.

6. List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

Source: NIC Retreat Workbook (verbatim, pg. 47)
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Officer Transition
A checklist for incoming officers

This checklist was designed for new officers to use as they begin their respective officer's roles. This can be used with outgoing officers, or answer questions of new officers, or with new officers after they have met with outgoing officers.

A. Programming – New Officers

___ Re-register organization at the Office of Student Activities and or changing the officer's contact information
___ Understand present and future programs
___ Develop a master calendar with meetings, programs and events
___ Develop a web-page or make current your existing web-page
___ Establish structure or meeting agendas
___ Discuss meeting times (place, time and advertisement)
   ___ Officer board meetings
   ___ Organization meetings

B. Goal Setting – New Officers

___ Evaluate past year's concerns and achievements
___ Evaluate past officer's goals
___ Establish new officer's, individual's and board's goals
___ Prioritize officer's goals to member's
___ Plan to present goals to members
___ Plan group goal setting at your next meeting
___ Help to prioritize organization goals with entire membership
INCOMING OFFICER GUIDE
Your Role as a Student Leader

1. **Work on the morale of your group members.** Unless they feel good about their roles, your group members will not be as cooperative and productive as they could be.

2. **Expect any changes to be accepted gradually.** Sometimes we expect people to accept changes overnight that we have been thinking about for months. Remember that it is almost impossible to change people... they usually must change themselves.

3. **Be available to help those who want your help.** When we attempt to force our ideas of assistance when it hasn’t been solicited, we risk building resistance among our group.

4. **Let your group members determine the group’s purpose.** Unless group members have a say in what is to happen, their participation will be half-hearted at best.

5. **Emphasize the process for working through problems rather than the final result.** Your desired results may change as your group changes. An open channel of communication which involves all group members will help you incorporate these changes.

6. **Approach change through cooperative appraisal.** When change is based on evidence, it reduces the chances for a win-lose situation. The decision will be based on what is right, rather than who is right.

7. **Encourage brainstorming and creativity.** Provide feedback and support for new ideas and avoid penalizing for mistakes made for the sake of experimentation.

8. **Share decision regarding policies and procedures.** By emphasizing how to solve problems, and involving your members in these decisions, you will created deeper commitment in your members.

9. **Recognize criticism as the first step individuals take in assuming responsibility.** Use criticism as a chance to solicit suggestions for improvement.

10. **Share the glory.** You cannot expect enthusiastic participation if you take all the credit.

11. **Have faith and confidence in the ability of your group.** People tend to live up to our expectations, be they high or low.

12. **Be sure your group has a common purpose.** Structure meetings so that issues of common interest are discussed with the whole group, and individual concerns are addressed at other times.

13. **Trust the motives of all group members.** Attend to every suggestion as a sincere one which deserves a sincere response.

14. **Don’t set yourself up as infallible.** Be honest and admit when you lack an answer. Don’t be afraid to be human.

15. **Be specific.** Communicate exactly what you expect and think.

16. **Be socially sensitive.** Avoid being witty or funny at the expense of group members.

17. **Use the inquiry method.** Use questions to get information and define issues.

18. **Be impartial.** Play no favorites and give all group members equal chance to participate.

19. **Promote group cohesiveness.** Make all group members feel as if they belong.

20. **Manage conflict, don’t ignore it.** Bring conflict into the open, and concentrate on issues, behaviors and facts rather than personalities.

Adapted from: Student Organizations' Handbook - The Wichita State University (1992-1993)
Incoming Officer's Transition Worksheet
[Questions to ask during transition]

Please think through and respond to the following questions regarding your responsibilities. This information will be helpful to your successor.

14. Things specific to the position I want to know about (forms, duties, etc...)

15. Things I should do over the summer...

16. People (positions) that I should get to know...

17. Services that I need to know about...

18. Things I need to know about working with my advisor...

19. Other questions I want answered...
Maintaining Continuity: Transition Questions
New Officers

**Directions:** Many of these questions are geared toward former, or out-going officers. New officers can use these questions to brainstorm ideas or goals for the upcoming term of office.

1. What do you perceive to be your organization's objectives or goals?

2. What do you consider to be the responsibilities of your office?

3. What are your expectations of yourself in the office?

4. What expectations do you have of the executive council?

5. What expectations do you believe your members have of you?

6. What problems or areas will require attention within the next year?

7. What should be done immediately in the fall?

8. Who do you anticipate will be most helpful in getting things done? (People outside your organization such as advisors, professors, administrative staff, etc.)

9. Write down one specific problem you anticipate you will encounter during your term.
### Incoming Officers - "Goals, Dreams, & Priorities"

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<tr>
<th>Things We Would Like To Accomplish</th>
<th>Barriers / Limitations</th>
<th>Resources</th>
<th>Unknown Questions</th>
<th>Why We Want This</th>
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GOAL SETTING GUIDE

GOAL SETTING

Considerations:

Are my goals consistent with my understanding of the purpose of the group? Will the members of my organization agree with my goals? Check with them. Am I being realistic? Can I accomplish my goals during my tenure as organization leader?

Goals I want to Accomplish During my Tenure:

1. Projects-
   A.
   B.
   C.

2. Process or manner in which we go about projects (i.e., involving people in decisions, having more members participate in meetings, having more interesting meetings, etc.)
   A.
   B.
   C.

Where Can I Begin?

Which goal seems most important to me?

Do I have the skills necessary to accomplish my goal? Who else in my organization can help me? Are there outside resource people who might help?

Is there anything I can do before tomorrow to help me reach my goal?

What can I accomplish next week?

What specifically can I do within one month to reach all my goals?

WILL I DO IT?
EVALUATION AND ASSESSMENT

Outgoing Executive Council Evaluation

1. Have we developed younger members who will prove to be exceptional and involved?

2. Will the membership be innovative and creative after we have left?

3. What programs or governing practices proved to be successful for us?

4. What was our greatest achievement as an executive council?

5. What was our greatest challenge as an executive council?

6. Three goals we would have liked to accomplish:

7. Three goals we would like our successors to achieve / build on:
Executive board/Officer position descriptions

President

Duties of an organization or club President:

- Plan, delegate, and evaluate, set goals and create ideas, tone, and direction
- Set and be aware of deadlines
- Communicate ideas and information and appoint committees and task forces
- Meet regularly with group Advisor (if applicable) and keep him/her appraised of
  activities of the organization
- Motivate and recognize the achievement of officers and members
- Understand, educate membership, and ensure that the organization adheres to
  campus and organizational regulations
- Facilitate all meeting of the organization and serve as official representative
- Mediate conflict within the organization
- Facilitate process of completing and submitting organization renewal
  information to LUCC
- Preside over and coordinate the officer transition process

Vice President

Duties of an organization or club Vice President

- Be an ex-official member of all committees
- Manage and inform the president of all committee activity
- Perform the duties of the president in his/her absence
- Oversee committee chairpersons (if applicable)
- Serve in partnership with the President as a leadership team
- The office of the Vice President often takes on other duties as desired/assigned

Treasurer

Duties of an organization or club Treasurer

- Prepare and adhere to an approved budget in conjunction with the President &
  Vice President
- Maintain accurate records
- Transact business on behalf of the organization with the college Business
  Office
- Be responsible for the collection or disbursement of funds
- Keep executive board informed of the financial strengths and weaknesses of
  the organization
- Keep financial records audited and up to date
- Work closely with any fundraising activities
- Work with the President & Vice President to apply for annual LUCC funding

Brought to you by Campus Activities
Org/Club Leadership, Development, & Transition

Secretary
Duties of an organization or club Secretary
- Record accurate minutes of all meetings
- Keep the organization's permanent records/archives
- Update all roster information (addresses, phone numbers, birthdays, etc.)
- Be an official club correspondent
- Order organization supplies
- Publish organization bulletin or minutes (if applicable)
- Maintain official membership record
- Complete club directory
- Attend all meetings (or find suitable proxy)
- Create & maintain the organization's website (if organization does not have a Webmaster position)

Social Chairperson
Duties of an organization or club Social Chairperson
- Oversee the planning of all organizational social events
- Assume the responsibility and liability if alcohol is served at organization events (i.e. education of members, waivers, registration forms, meeting with advisors, etc.)
- Obtain, in collaboration with the Campus Activities Office, any contracts required for organization social events
- Be aware of any legal implications of planning a social event
- Read, understand and educate membership on all LUCC and LU alcohol policies and programs
- Delegate tasks related to planning social events

Service Chairperson
Duties of an organization or club Service Chairperson
- Oversee the planning of all organizational philanthropic and service events
- Assume the responsibility and liability of membership understanding and risk involved in activity, if appropriate
- Assist the organization in setting goals and determining projects for annual service activities
- Be aware of any legal implications of said service event
- Share information with the Volunteer & Community Service Center prior to and/or following an event
- Delegate takes related to planning service events