

Sonoma State Student Org Officer Transition Manual

Benefits of a Successful Leadership Transition

1. Provides a transfer of significant organizational knowledge.
2. Minimizes the confusion of leadership changeover.
3. Gives outgoing leaders a sense of closure.
4. Utilizes the valuable contributions of experienced leaders.
5. Helps incoming leadership absorb the special expertise of the outgoing leadership.
6. Increases the knowledge and confidence of the new leadership.
7. Minimizes the loss of momentum and accomplishment for the group.

What should I do First?

In this section, we have provided you with reflection questions that pertain to officer transitions. While reviewing each question, think about your organization and the information that would benefit it's future leaders.

1. What information is important for your new officers to have?
2. What is the most beneficial way for you to pass on this information to each position?
3. What resources and contact information do you need to pass down to the new officers?
4. Are there relevant processes, rules, policies, or guidelines that new officers should be aware of? (for example: The Annual Recognition Process, Associated Students Banking Processes, RUFAS Reservations, Food Policy, Travel Policy, etc.)

Documentation to Share

- Copy of Organization Constitution and Bylaws
- Position Description of officers and members
- List of any committees (if you have them) and their descriptions
- Contact Information of Important Offices and Departments on Campus
- List of basic annual procedures and an outline/calendar of events
- GetInvolved Information
- Mission, Philosophy, Goals, and/or purpose statement of the organization
- Any Financial Records, Budget Documents, or Associated Students Grant Information
- Evaluation of previous or current projects
- Any historical documents or records you have of the organization

- Meeting Minutes or Agendas

Incoming/Outgoing Officer Transition Meeting

Before the newly-elected officers of your organization officially assume their responsibilities, it is wise for the old and new officers to get together for a “transition meeting.” Through such a transition 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.

While we are currently attending “Zoom University,” we encourage you to set up a meeting between the outgoing President, Treasurer, and the Incoming President, and Treasurer to assist with this transition process. The following outline can help you make your transition meeting go as smoothly as possible.

1. Welcome and Introductions (Help participants get acquainted and explain the purpose of the meeting)
2. The Year in Review
 - a. **Goals: Review the group’s goals for the previous year.**
 - i. What did we hope to accomplish?
 - ii. How well did we do on each goal?
 - iii. Which goals should be carried on this year?
 - iv. Which goals need to be changed?
 - v. Which goals are no longer feasible?
 - b. **Programs and Activities: Evaluate what your group did.**
 - i. How effective were the programs / activities we sponsored?
 - ii. Did we have a good balance in our schedule of programs and activities?
 - iii. Were our programs and activities consistent with our goals?
 - iv. Which activities and programs do we want to repeat?
 - c. **Membership: Evaluate number of members and their commitment**
 - i. Do we have too many, too few, or just the right amount of members?
 - ii. Were our recruitment efforts successful?
 - iii. Are our members as actively involved as we want them to be?
 - iv. Were the chances for members to get involved in a meaningful way?
 - d. **Officers and Organizational Structure: Evaluate officers and structure.**

- i. Are officer roles and responsibilities clearly described?
 - ii. Did officers work as a team, or is there more teamwork needed?
 - iii. Is the time and effort required in each office comparable?
 - iv. Is there two-way communication between officers and members?
 - v. How do the members feel about the officers?
- e. **Organizational Operations: Evaluate finances, communication, etc.**
 - i. Were the finances adequate for our group, and managed properly?
 - ii. Were meetings run effectively?
 - iii. Was their frequency adequate?
 - iv. Did the committee structure work?
 - v. Did we have scheduling conflicts with other groups or activities?
- f. **Faculty Involvement: Evaluate both quality and quantity.**
 - i. Did our advisor provide the support we needed?
 - ii. Did we give our advisors and other faculty a chance to get involved?
 - iii. How could we improve faculty involvement?
- g. **Public Image: Evaluate how other groups perceive you.**
 - i. How do we see ourselves?
 - ii. Is this how “outsiders” see us?
 - iii. How can we enhance our image?

3. Your Legacy to the New Officer Team

- a. What are the current strengths and weaknesses of the group?
- b. What is the best advice you can give your successor?
- c. What were there major challenges and accomplishments in your term?

Incoming/Outgoing Officer Individual Meetings

Encourage the new and outgoing officers from each position to meet individually via Zoom, Facetime, or other virtual meeting platform to discuss:

- a. Responsibilities of the position, with a job description if possible.
- b. A timetable for completion of annual duties.
- c. Unfinished projects.
- d. Important contacts and resource persons.
- e. Mistakes that could have been avoided.
- f. Advice for the new officer.
- g. Any questions the new officer may have.
- h. Where the outgoing officer can be reached with future questions.

Goal Setting for New Officers

It is important for new officers to have the opportunity to make a positive impact on the organization. After learning about what each position entails and the roles that the new officers will fulfill, it is time to set goals for the next year! Goals should be:

- Set for the short and long term
- Should have effective benchmarks to assess your progress towards the accomplishment of said goal
- Specific and Measurable

In creating your organization's goal action plan, the first step is to recognize a goal that you hope to achieve. For example, if your goal is "double the amount of money raised in the previous year". When you have realized your goal, understanding the obstacles and resources associated with that goal is important. For this example "lack of member dedication to fundraising events" and "not enough scheduled fundraisers" are two obstacles and "the local community" and "the Campus community" could be used as resources towards helping to accomplish your goal. An understanding of the obstacles and resources available to your organization enables you to initiate action steps to overcome the obstacles and achieve your goal. In this example, "selecting someone to schedule events" and "utilizing your members fundraising ideas" will help your organization to reach its goal of doubling the amount of money raised from the previous year.

Wrap-Up

Please make sure that new officers know how to get into contact with their Faculty/Staff Campus Advisor as well as their appropriate Student Involvement Advisor. Introducing new officers to Advisors via email is a great way to get the relationship started and ensure a seamless leadership transition. Thanks for taking the time to review this transition manual. We hope that is helpful to you and the continued success of your student organization here at Sonoma State!