Officer Transition

Every year unsuccessful leadership transitions hamper future successes of student organizations at the University of Rochester. This year please remember that a successful transition is not only the glue that will hold your organization together from year-to-year but also the fuel that continues to propel them in a forward direction. The good news is that a successful transition is neither difficult nor very time consuming. Use this as a check list for the outgoing and incoming officers. Talk about each bullet point if and how it could be relevant to your organizations success.

Starting the Conversation between Officers

- What are the current strengths and weakness of the group?
    - Strength Quest, Myers-Briggs, etc.
- What was your best experience in this position?
- What tips could you give your successor to make things smoother for next year?
- Name the administrators/staff you found to be helpful in your position.
- What did you find most difficult in this position?
- What was the best resource you used in this position?
- Which offices/departments/student groups did you co-sponsor with that worked well?
- Please list any projects or ideas you were developing that you would like to see continue.
- Name one thing you wished you knew when you started the position.
- Do you think the student body knows of your position and the services your group provides?

Officer Transition and Organizational Structure

- ☐ Responsibilities of the position, with a job description
    - Officers Job Descriptions – Setting up a meeting with officer/E-Board
        - Expectations for new officer
            - Role and Responsibility
    - Advice for the new officer
    - Any questions the new officer may have
    - Where the outgoing officer can be reached with future questions
- ☐ History of Organization
- ☐ University of Rochester's Policies and Procedures
    - See Advisor
- ☐ Important Contacts/Resource Person

Programs and Activities

- ☐ A timetable for completion of annual duties
    - Organization's Calendar
        - Important Annual Events (i.e. Leadership Training Events, Budget and Bill Deadlines)
- ☐ Unfinished projects
    - Statues Report on continuing projects
- ☐ Mistakes that could have been avoided

- Recap on years programs (look as Assessment forms)
  - Want went well?
  - What could be changed?
  - What is no longer feasible?
  - What should we continue?

Advisor/Organizational Operations

- Important contacts and resources persons
  - Review and pass on old records (Pass along everything you got!)(including meeting agendas and minutes)
    - Binder(s)
    - Files
    - Notebooks
    - Copies of documents used for advertising past events
    - Correspondence
    - Social Media Usernames/Passwords
    - Keys
  - Organization's Constitution, Mission Statement
    - Hyperlink to process
    - Provide Resources
- Organizations Status Report
  - Annual Budget
- Campus Community Connection
  - How to Update Board Members/General Members
  - Instructions on how to transfer over ownership of email lists/websites
- How could we improve faculty/advisor involvement?