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)
  o Want went well?
  o What could be changed?
  o What is no longer feasible?
  o What should we continue?

Advisor/Organizational Operations

Important contacts and resources persons
  o 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
  o Organization’s Constitution, Mission Statement
    ▪ Hyperlink to process
    ▪ Provide Resources

Organizations Status Report
  o Annual Budget

Campus Community Connection
  o How to Update Board Members/General Members
  o Instructions on how to transfer over ownership of email lists/websites

How could we improve faculty/advisor involvement?