

Officer Transitions
Leadership Toolbox
Podcast Transcript

Centennial Student Union & Student Activities
Minnesota State University, Mankato

Welcome to the Student Activities Online Leadership Toolbox. My name is John Bulcock, and I am the Assistant Director of Student Activities for Greek Life and Off-Campus Housing at Minnesota State University, Mankato. I am going to be your podcast guide. This podcast is about effective officer transitions for student organizations.

One of the most common comments from student organization leaders wrapping up their terms in office is that there were several things they wish they had known when they started. They may complain that they never had a proper transition. While there are a lot of things that are learned only after having done the job for a while, there are many things that really should be learned by or passed on to leaders at the beginning of their terms. Often times, leaders will complain that the outgoing officer was in such a hurry to be done and get out that they simply handed over a notebook and said “good luck.” This does not set the organization up for continued success. Instead, it results in leaders having to spend time reinventing the wheel.

Officer transitions should be planned for in advance and should not be something that groups scramble to put together in the last days of the term. If this is done well, the transition will be more thorough and will be much smoother than if it is thrown together at the last minute. If you’re planning a retreat, make sure it really is a retreat. The term “retreat” means to step back or move away from, so if you’re able to,

have your retreat be a step back from the normal. This will allow your group to better focus on the task at hand. You might even ask your advisor to help facilitate the transition. If you're not able to do something in a different location or format, be sure the time allotted is adequate, and make sure to stress the importance of the opportunity to your members.

Both the outgoing and the incoming officers need to be prepared for the transition. Officers should review the position description in the organization's Bylaws or Constitution and should make sure that they actually match what the organization does, in practice. The outgoing officer should be prepared to pass on the basic knowledge about the role as well as any technical knowledge. This person may know where things are. They may know passwords for electronic resources. They should be willing to "give a tour" of the position, showing the incoming officer where to go and who to talk to about various things. If your group is part of a larger national organization, the outgoing officer should be able to introduce incoming leaders to the processes and people they may need to know.

Earlier, I mentioned that, sometimes, it is tempting to just hand over a notebook and run away. If there is, in fact, a notebook that is passed on, the outgoing officers should review what is in the notebooks and ensure that what is there is still relevant. If there is stuff in the notebook that doesn't matter any longer, get rid of it!

There are some questions the outgoing officer should ask themselves as they prepare for the transition.

- What do you wish you had been told before taking this position?
- What officers and advisors do you work with the most?

- What were your biggest successes this year?
- What are ideas that you tried but which didn't work out?
- What do you recommend the next officer try?
- Did you run out of time and not get to work on a specific project you wanted to?
- What do you really do in your position?

Answering these questions will help guide a transition and can be especially helpful if an officer doesn't know where to start.

In addition to answering these questions, outgoing officers should prepare to provide their successors with some key tools or documents. Some of these might include:

- An updated copy of the Constitution and Bylaws
- Position descriptions and expectations of officers and members
- A contact list of important people they will work with
- An organization roster with contact information
- Financial records

The incoming officer has a responsibility to prepare, too. Besides trying to familiarize themselves with the basics, they would be well-served to answer some questions before the full transition takes place.

- What do you want to accomplish with this office this year?
- How can you build on the programs already in place and continue to support members?
- What don't you know about the position you're getting into that you should know?
- What are things that you need to watch out for as you start in your role?

- What should be your immediate priorities, and what are the things that can wait until later in your term?

If the outgoing officer doesn't know the answers to these questions, they should ask them during the transition meeting or retreat.

The incoming officer should be prepared to set goals and make any revisions to their job description fairly early in their term-before it gets too late and before they have a chance to forget about it!

The Stop/Start/Continue List can be another valuable tool to assist with your transition. Have your members ask themselves the following questions:

- Are we doing anything that doesn't make sense, and should we **STOP** doing these things?
- Are there things we're not currently doing that we should **START** doing?
- What should we **CONTINUE** doing, given that they make sense and work well for our organization?

Answering these questions will be good conversation starters and can help with the development of a strategic plan or a goals list, as well.

The officer transition period is one of the most important for an organization. Failure to take advantage of this great teaching and learning opportunity can cause an organization to spend more time catching up than actually being productive and progressing.

In summary, some key tips include:

- Plan for your transition ahead of time.
- Be organized, and anticipate potential questions or issues.

- Ensure that adequate time and space is allowed.
- Pass on what is needed

Lastly, have fun, and be excited about the change the organization is going to experience.

This podcast was presented by Student Activities at Minnesota State University, Mankato. We hope that you have found the information helpful. Find other leadership podcasts at www.mnsu.edu/activities/toolbox.