Student Group Officer Transition

The process of transitioning officers is a critical step in the long-term success of a student group. Officer transitions allow past officers to share the group’s success and areas for improvement, and give new officers (or officers who are changing positions within a group) an opportunity to learn more about their position. Without a successful transition, new officers essentially have to “reinvent the wheel” and spend extra time learning about the group and the responsibilities of their position, hindering the group’s progress. Both outgoing and incoming officers have a responsibility to make the transition as clear and smooth as possible. There are a few ways that officer transition can occur. The most successful transitions have both in-person and paper/online components.

In Person Transition Plan
Formulate a plan that will address how your outgoing officers will pass on their experiences and relevant group information to new officers. Some ways to pass on information in person include:

- A meeting with the newly-elected and outgoing officers (all together)
- A meeting between the newly-elected and outgoing officers (one on one; i.e., outgoing treasurer meeting with incoming treasurer)
- A retreat during which newly-elected and outgoing officers meet for a full day or an afternoon while the newly-elected officers meet for a second day to brainstorm goals
- An informal information gathering session during which newer officers gather and record information and knowledge from outgoing officers/seniors

Things to Consider
Some helpful questions that outgoing officers should reflect upon before going into the transition meeting, include:

- What was your transition like when you took office?
- What information did you wish was covered from the past officer?
- How could you have been better prepared?
- What was the best resource you used in this leadership position?
- What were your greatest mistakes and lessons learned from them?
- If I could give one piece of advice to the new team, it would be__________
- If I could do my year all over again I would ______________

Document Transition Plan
You shouldn’t just talk about your group- you should also have documentation from throughout the year. The following items should be kept as paper copies in a binder/folder system or can be organized and stored electronically through Google Drive and/or Sites tied to your group-specific University of Minnesota account or any other electronic storage options:

General Group Information

- Your group’s history
- Constitution/Bylaws (including mission and/or purpose statement and officer responsibilities)
- Group information (passwords, membership lists, door access, etc.)
- Calendar with all important dates or reminders for registration for events (group events, any reservation dates held by the group, student group registration, Reservation Day, Paint the Bridge and AF registration). Google Calendar is a great resource for passing on these dates.

{Information continued on back}
- List of annual procedures (can also add to calendar)
- Meeting agendas/minutes
- Posters/advertisements
- Important contact information and correspondence
- Current reservations or agreement documentation held by your group for future months (for example: confirmations and related correspondence)
- Spoken agreements with partners or vendors for the future
- Goals for the year and progress; where does the group see itself progressing within the next year? Make sure the goals are SMART (Specific, Measurable, Attainable, Realistic, and Timely)
- Projects that the group has been working on and their progress- is there any unfinished business?
- Event evaluations. What worked and what didn’t?

**Financial Information**

- Annual Report (may include some of the following documents)
- Budgets
- Tax ID or EIN
- Receipts/Invoices
- Past 990s
- Non-Profit/Tax-Exempt Documentation (if applicable)
- Grant Applications
- Banking information (account info, voided checks, bank statements)
- Fees Request (If Applicable)

**Incoming Officer Responsibilities**

- Understand your group’s programs, objectives, mission, goals, and your officer responsibilities
- Re-register your group: [http://sua.umn.edu/groups/reregister.php](http://sua.umn.edu/groups/reregister.php)
- Review your constitution and other annual plan documents: [http://sua.umn.edu/groups/forms/request_for_student_group.pdf](http://sua.umn.edu/groups/forms/request_for_student_group.pdf)
- Make sure that you have access to your group’s keys, passwords, or anything that would allow you to access your group’s information.
- If your group is an RSO and has re-registered for the next year, stop by the Student Activities Office in 126 Coffman to receive a bank account letter. Many banks require this letter to give new officers access to the group’s bank account.
- Establish meeting times, locations, and agendas
- Plan a goal setting meeting
- Figure out a plan and expectations for having officers keep each other in the loop and up-to-date with their responsibilities and projects (especially during the summer)
- Get to know your fellow officers and how you can best work together. Consider using your Strengths as a basis for this conversation. Strengths Facilitators can be requested to do a team building session with your group, find out more here: [http://www.strengths.umn.edu/strengths-workshop-facilitation-request-form](http://www.strengths.umn.edu/strengths-workshop-facilitation-request-form)
- Don’t be afraid to ask questions!

The key to a successful transition is being organized. Make sure that your group starts filing and organizing information as soon as new officers are elected. Meeting with your group as early as a couple weeks after your transition can get the group thinking about how effectively your transitions went and what can be improved for next year. Remember to take notes during this time- these notes can help guide your group as you prepare to welcome incoming officers. Your group should allow for at least one month overlap for new officers to work closely with outgoing officers and have the most effective transition possible (an easy way to remember this in a year is to add it to your group’s calendar). Student Activities Advisors are also available to discuss strategies for an efficient and smooth transition.