Officer Transitions: The Key to Leaving Something Better Behind

By Dale Masterson
During my time as an undergraduate, I found myself a newly elected fraternity president and later the student government vice president. I can easily recall the struggle I experienced in learning the ropes of these positions. Without the assistance of an officer manual or a structured officer transition process, I was forced to learn on my own as I progressed through the challenges these positions offered. I was fortunate in both cases, however, to have an outstanding and dedicated advisor on whom I could rely.

But is there a reason new student organization officers should not be able to rely on outgoing officers to reduce the significant learning curve they often experience? I don’t think so. Usually, this isn’t possible, though, due to outgoing officers not investing time in training their replacements or the organization lacking a structured transition process.

For an organization to prosper and grow, each member, and specifically each officer, should be charged with the responsibility of leaving something better behind. Everyone has heard the adage “don’t reinvent the wheel,” but for the majority of student organizations, each incoming officer must spend the first one-third to one-half of their term learning their position. This significantly reduces the amount of time and energy to be invested in improving the organization and making an individual impact on the group’s future. However, outgoing officers have the ability to propel their organization forward by simply investing in an officer transition process.

At the end of the 2003-04 school year at the University of California-Riverside, our outgoing program board chair and assistant chair, Dilashika Wamgakumara and Jennifer Li, did just this. Without any prompting, they recognized the importance of their job and spent the last two months of their terms compiling, designing, printing and distributing the most comprehensive program board manual we had to date. The manual served as an invaluable resource to this year’s program board and specifically allowed the new chair and first vice chair to hit the ground running by reducing transition time in learning their new roles and responsibilities.

A structured and intentional officer transition process is a key element in the life of an organization and it offers a variety of benefits. See the display above right.

Getting Started

How do you develop an effective officer transition process if you do not have one in place? I recommend you first convene a meeting of everyone involved in key leadership positions and your organization’s advisor to discuss the issue and determine what might be most effective for your group. Once you have outlined a plan, present it to the full membership for their consideration and approval.

The next important and often overlooked step is to make a commitment to this process by incorporating it into your organization’s constitution. Since new student organization officers historically commit so much time to reinventing the wheel, the student organization staff at the University of California-Riverside are currently exploring the mandate that a transition process be a required part of every organization’s constitution, thereby helping to ensure that organizations no longer start from scratch each year.

An effective officer transition process should include and address a variety of organizational issues and the intentional scheduling that promotes the process. The key elements of an effective process are:

- **The nurturing of future leaders.** Begin early in the year to identify emerging leaders within your organization. Encourage their potential, assist them in developing necessary skills, delegate responsibility to them, and assist them in gaining an understanding of the importance of their increased involvement.

- **An election process that allows for effective transitions.** Many organizations hold their elections at the end of the school year. Consequently, incoming officers find themselves floundering without a resource since the outgoing officer has graduated or left campus for the summer. Schedule elections to occur by at least the middle of the spring semester (or between the winter and
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Spring quarters) so incoming and outgoing officers will experience overlap in membership. Rather than also jump into the process of electing officers, hold an information session prior to elections during which the responsibilities and duties of each position are outlined and potential candidates can have an opportunity to ask questions of current officers. This should help cultivate better prepared candidates.

- Compiling officer notebooks. If it is not already included, you should revise all officer job descriptions in your organization's constitution to include the requirement that each officer compile a notebook or manual for their successors, as well as the responsibility of training their successors. Officers should regularly be held accountable for updating and maintaining their notebooks so they are not scrambling to compile them the night before an officer retreat or providing binders of outdated information. You should clarify where notebooks should be stored so once you're ready for officer transition, outgoing officers won't suddenly be reporting notebooks have been misplaced.

- Planning and conducting an officer transition retreat. The incoming president, outgoing president and advisor should work together to plan a transition retreat that will effectively allow all new officers to immediately begin to implement ideas and address goals, rather than having to start from scratch and learn their positions on their own.

The Most Crucial Components

While each of the four elements listed above are important, I believe the most crucial to effective officer transition include the officer notebooks and the officer transition retreat.
The Officer Notebook

To effectively train a replacement, the outgoing officer needs records, notes and information about what they accomplished during the year; other things they attempted and what remains unfinished.

Since a thorough officer notebook can play an integral part in the officer transition process by providing necessary records and information, it's important to examine the recommended contents of such a notebook. Information that should be maintained is listed in the display on Page 52.

By also requiring each officer to complete a monthly officer report form for submission to the president and advisor and for inclusion in the officer notebook, you will have a good communication tool and a way for incoming officers to have a firsthand account of tasks and challenges. The officer report form will be an easy regular addition to the notebook and can include answering prompts such as, "What tasks were attempted this month?" and "What areas of your position need assistance?"

The Officer Transition Retreat

An officer transition retreat can be extremely effective because merely passing a notebook from one person to another is not in itself an effective transition. Such a retreat can provide a wonderful atmosphere of information sharing that truly empowers incoming officers while also recognizing the accomplishments and value of outgoing officers. It can also facilitate a team atmosphere that will prove beneficial throughout the coming year.

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An officer transition retreat should be built over the course of one day that allows everyone to be available. You should communicate a sense of purpose when announcing the retreat date to members. Do not hesitate to let them know about the fun and exciting activities you have planned for them as well as providing a full understanding of the purpose of the retreat and its value to the organization. Including this type of retreat at an off-campus location can also enhance the group dynamics and the ability to fully focus on the tasks at hand.

In establishing an agenda for the day, be sure to include ample time for bonding among members, as well as icebreakers or team building activities. This is a good opportunity to remind members why they joined the organization and to create fun opportunities for them to become reacquainted while generating excitement for the coming year. These short activities will also provide the necessary mental and physical breaks in what otherwise could be a long day.

It is also beneficial for the group to establish a list of goals for the retreat so everyone is clear in their understanding of its purpose and to ensure everyone will be going in the same direction. You may wish to establish specific learning objectives you would like to achieve. You can also schedule your advisor, staff members from the student activities office or other relevant professionals to be guest presenters to assist in accomplishing specific learning objectives. An officer transition retreat can be an ideal time for presentations or training pertaining to any weakness experienced by your organization, such as workshops on using parliamentary procedure, presentations about how to achieve effective meetings, general leadership presentations, etc.

The majority of the agenda for an officer transition retreat can include any number of activities that will allow an incoming officer to leave the retreat with a firm grasp of their duties, how to carry out their responsibilities, and the confidence and ability to go forward instead of reinventing the wheel. The outgoing officer should provide a detailed explanation of the officer notebook's contents and be available to answer questions and serve as a resource for the incoming officer. It is even helpful to come prepared with a list of questions or worksheets for each outgoing officer to discuss with their replacement. These questions, asked from the point of view of the incoming officer, are displayed above.

Not only is an officer transition retreat a good opportunity for outgoing officers to share information, but it is also a great venue for incoming officers to begin to share with each other. Take advantage of this opportunity by having new officers establish and share individual goals as well as create common goals. You may also want to develop a related worksheet for each new officer to complete that is filed in their officer notebooks to serve as a reminder throughout the year. Worksheet questions for them to answer might include topics such as:

- Reflecting on why they decided to run for office;
- New ideas they would like to implement;
- Any foreseeable problems they might encounter, as well as possible solutions; and
- Who or what resources are available to them to assist with addressing those problems.

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The retreat is also a good opportunity for new officers to discuss their event plans for the coming year and to establish a calendar of events because the more events tentatively planned early on the better.

When planning your officer transition retreat, build into your schedule some new traditions for your group that will be enjoyable as well as provide closure for outgoing officers. A colleague, Megan Howe of Whittier College (CA), shared that she plans a transition meeting for incoming and outgoing resident assistants each year. This transition meeting activity is fun and can be adapted for use with any type of organization. She brings an empty basket for each new RA to the transition meeting, while each of the outgoing RAs bring an item for the baskets. Many of the gifts are humorous as well as meaningful and each RA is given the opportunity to explain why they selected a particular item (e.g., Advil for annoying students, frappuccinos for late nights, earplugs for study nights on a noisy hall, etc.). This activity provides closure for outgoing students while providing fun and excitement for the new ones. A modified version of this activity could entail a ceremony in which each outgoing officer turns over an item to his or her predecessor (e.g., the outgoing president passing the gavel to the incoming president, the outgoing treasurer turning over a blank receipt book to the incoming treasurer, etc.).

A “Changing of the Guard” closing ceremony can also be a nice new tradition. In such a ceremony, the president or advisor acknowledges the accomplishments of the outgoing officers, the exhilaration and the frustration they experienced, and how they probably learned more about themselves, the group, and about leadership than they ever thought possible. This can also be an appropriate time to subtly remind outgoing officers that everyone has his or her own unique work style and while you hope outgoing officers will be available as a resource and consultant, no one works very well with someone peering over their shoulders.

Follow-up Activities

While much can be accomplished with an officer transition retreat, there are follow-up activities that should not be overlooked. Outgoing officers should acquaint incoming officers with important campus contacts, such as personnel in the student activities office, student government, scheduling office, etc. This might also be the ideal time to re-register your organization for the coming year while updating contact information to include that of the incoming officers. Remember to also change any account or mailbox information, Web page access, etc. During this time, you may also want to explore the possibility of making any necessary room reservations for the coming year.

Since I can remember how it felt to be unprepared for the roles of fraternity president and student government vice president, I have been able to recognize and understand the importance of students having an effective officer transition process. I hope you will be able to find value in the suggestions I’ve offered, as well. As I begin the new challenge of serving as the public information officer for a local political organization, I will expect to receive a thorough officer notebook for my position. And if there is not one, I will know what information to seek from the outgoing officer and I will immediately begin assembling an officer notebook for my successor.

About the Author

Dale Masterson is director of Student Orientation and Involvement at the University of California-Riverside, where he previously served as assistant director of the Student Life and Leadership Center. Earlier in his career, he served as an admissions counselor at Rockhurst University (MO), as well as at Emporia State University (KS). In NACA he has served as the NACA West conference chair, having also served as the region’s communications coordinator and as the educational and professional development coordinator for the former NACA Far West Region. Additionally, he was a facilitator for the NACA SGA West and Leadership West workshops. On the national level, he was a member of the Educational Sessions Review subcommittee of the 2004 National Convention Program Committee. He holds a bachelor’s degree in communication from Emporia State University (KS) and a master’s degree in counseling and guidance from the University of Missouri-Kansas City.