

# LEADERSHIP TRANSITION CHECKLIST

## **PART I. OFFICER TRANSITION: A CHECKLIST FOR OUTGOING OFFICERS:**

This checklist is intended to provide new officers a complete orientation of their duties and responsibilities that is provided by your organization's outgoing officers. Some ideas will pertain to your organization while other ideas may not be suitable, but some will help all organizations:

### **A. Information about the Organization:**

- Review your organization's history
- Review College's Policies, and Procedures
- Review the organization's constitution, mission statement
- Review your goals and objectives for the last year

### **B. Officer's Roles and Printed Materials**

- Review and pass on old records, binders, files, notebooks and correspondence
- Review job descriptions
- Review officer's written expectations
- Review your organization's agenda and minutes
- Review your organization's calendars
- Review your organization's status reports for continuing projects
- Review your organization's evaluations for projects, completed
- Review your organization's previous minutes financial records, mailing lists
- Review your achievements.
- Review your failures.
- Pass on secretary's-membership list, contracts, addresses, phone numbers, email addresses etc.
- Provide financial information such as treasurer's accounts, fundraising information and copies of completed requisitions.

### **C. Officer Introductions**

- Introduce officer to key contact people-include their telephone number
- Presiding and function in meetings

## **Part II. OFFICER TRANSITION: A CHECKLIST FOR NEW OFFICERS:**

This checklist was designed for new officers to use as they begin their respective officer's roles. This can be used with outgoing officers, or answer questions of new officers, or with new officers after they have met with outgoing officers.

### **A. Programming- New Officers**

- Re-register organization at the Office of Student Life and or changing the officer's signatures for account access
- Understand present and future programs
- Develop a master calendar with meetings, programs and events
- Develop a web-page, or make current your existing web-page for next year
- Establish structure or meeting agendas
- Discuss meeting times (place, time and advertisement)
- Officer board meetings
- Organization meetings

**B. Goal Setting-New Officers**

- \_\_\_ Evaluate past year's concerns and achievements
- \_\_\_ Evaluate past officer's goals
- \_\_\_ Establish new officer's, individual's and board's goals
- \_\_\_ Prioritize officer's goals to member's
- \_\_\_ Plan to present goals to members
- \_\_\_ Plan group goal setting at your next meeting
- \_\_\_ Help to prioritize organization goals with entire membership

**C. Officer Training: Some Helpful Hints for Officers**

- \_\_\_ Decide when new officers will take over
- \_\_\_ Utilize Office of Life:
  - \_\_\_ Leadership Workshops
  - \_\_\_ Officer Transition Workshops
  - \_\_\_ Meeting Management
  - \_\_\_ Publicity and Fundraising Ideas
  - \_\_\_ Parliamentary Procedures
- \_\_\_ Director of Student Life: Nikki Schaper, (909)986-8986

When your year as an officer/organizer/ of your organization begins to end, and new leaders are selected, how do you leave your position? How do you ensure that the new officers are as ready as they can be to continue to provide your organization with strong leadership?

### **Transitions Benefit Incoming and Outgoing Officers:**

Having served your term in office, your organization should be more effective than it was, when you first accepted your position. Exchanging organizational information as an existing officer can be your most important duty. Gracefully transferring your knowledge and authority can have multiple benefits:

1. Your organization will not repeat ineffective practices, because it can now begin to build on your previous knowledge.
2. Successful transition will prevent the "lame duck" period when group effectiveness can be limited.
3. Your development of an effective officer transition process will assist outgoing leaders to bring closure to their experiences. It can help them let go-which is often a difficulty process, for those leaders you are vested in the welfare of the organization.
4. Experienced leaders will feel needed as you use their expertise for transition programs.
5. New leaders will start their jobs with increase confidence and knowledge of available resources.

### **A. Thorough Leadership Transition Plan Has Several Benefits For Members:**

1. Provides for transfer of significant organizational knowledge.
2. Minimizes the confusion of leadership change.
3. Gives outgoing leaders a sense of accomplishment and closure.
4. Utilizes the valuable contribution of experienced leaders.
5. Helps the incoming leadership take with them some of the special expertise of the outgoing leaders.
6. Increases the knowledge and confidence of the new leadership.
7. Minimizes the loss of momentum and accomplishments of the group.
8. Provides a sense of continuity among the membership.

### **B. When do you start?**

1. Begin early in the year to identify emerging leaders.
2. Create an organizational structure to support leadership development.
3. Develop a mentoring program.
4. Develop leadership notebooks.
5. Create a shadowing program.
6. Encourage these potential leaders through person contact. Help in developing skills, delegating responsibility to them, sharing with them the personal benefits or leadership, clarifying job responsibilities, letting them know that will be orderly and thorough, and last modeling an open encouraging leadership style.
7. When new officers are elected, orient them together as a group with all of the outgoing officers. This process provides the new leaders with opportunity to understand each other's roles and to start building their leadership team.
8. Be sure to transfer the knowledge and information necessary for them to function effectively.
9. An organization's history and flowchart is helpful.

## **Smooth Transition Includes:**

1. Elect officers one month before installation to provide an "overlap" period for new and old officer to work together.
2. Filling the gaps for new officers by asking yourself what you wished someone had told you a year-ago.
3. Reports about traditions, ideas, projects, and continuing projects and concerns or ideas that were never implemented.
4. Review and make current if necessary your constitution and by-laws to reflect changes made during your administration.
5. Review job descriptions to make sure they accurately describe the offices your organization needs and uses.
6. Encourage informal meetings between incoming and outgoing officers to provide a smooth transition.
7. Create a transition retreat.
8. Review your mailing list or membership records to make them current.
9. Leave behind files that you won't need, but think might be helpful to the new person.
10. Introduce incoming officers to advisors (faculty, staff and alumni), food service personnel, campus bookkeeper, facilities reservation staff, Associate Student officers, related departments, other student leaders and university administrators.
11. Orient incoming officers to financial and budgeting, facilities reservation, running a meeting, record-keeping, club registration, web-page or related internet sites and program planning.

## **Leave Behind Printed Materials:**

1. Leave things organized; stuff in desk drawers in piles might be more hindering rather than helpful.
2. Leave: University policies, and procedures, your organization's constitution, mission statement, goals and objectives for the last year, publicity materials, job descriptions, correspondence, history, agenda and minutes, calendars, job descriptions, status reports for continuing projects, evaluations for projects, completed, previous minutes financial records, mailing lists, etc.

## **An Effective Transition Program is a Stepping Stone to Building A Strong Team For The Future:**

Team Building includes ten essential elements:

1. Knowing the skills, abilities, needs, and fears of your membership.
2. Fosters open and honest communications.
3. Builds positive social relationships.
4. Communicates frequently.
5. Delegates responsibilities.
6. Trusts each other to complete tasks.
7. Provides mutual support.
8. Builds respect... appreciation of differences.
9. Use the uniqueness of members to accomplish goals
10. Builds pride for your group.

PLEASE PRINT LEGIBLY:

Office Title \_\_\_\_\_ Term of Office: MO/YR \_\_\_\_\_

MO/YR \_\_\_\_\_

Last Name \_\_\_\_\_ First \_\_\_\_\_

\_\_\_\_\_

E-mail

Address: \_\_\_\_\_

Local Mailing Address

\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Code \_\_\_\_\_

Local Phone Number \_\_\_\_\_

Permanent Home Address

\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Code \_\_\_\_\_

Home Phone Number (include area code)

\_\_\_\_\_

Expected Graduation Date \_\_\_\_\_