



Officer Transition Guide

Continuity is vital when transitioning officers. How can you continue to build a position if there is nothing to build off of? This document will help with the process when transitioning from the outgoing officer to the incoming. Having the incoming and outgoing officers take time to exchange information and allow the incoming officer to have a better understanding of what the position entails, will set them up for success.

Outgoing Officer

Name: _____

Term: _____

Congratulations on completing a successful year as an officer! Now that you are handing off the position to a different member, take a moment, and reflect on what you have done this past year. What are some lessons learned and how can the next officer apply them? Please fill out this transition guide and review this with the incoming officer during a one-on-one onboarding meeting with him.

1. What was your budget for this position?

2. What would you have done differently in this position?

3. What were your responsibilities in this role?

Officer Transition Meeting

Names: _____

Term _____

Sitting down and going through the position details with the incoming officer creates a better sense of continuity with the transition. Having an advisor present is highly recommended to give each officer advice, guidance, and talking points.

Prior to the meeting, please take the time to gather any resources that you may have collected in your time in the position.

- | | |
|--|--|
| <input type="checkbox"/> Organized Notebooks/Binders | <input type="checkbox"/> Contacts for the Position |
| <input type="checkbox"/> Social Media/Accounts | <input type="checkbox"/> Helpful Resources |
| <input type="checkbox"/> Electronic Files | <input type="checkbox"/> _____ |

1. Look through the documents being handed over. What is important?
2. What is the current status of unfinished projects? What still needs to be done?
3. What problems did you run into during your time in this position? How did you overcome them?
4. How can the timeline of events and planning be more efficient for this position?
5. Who/what was the most helpful resource to you in this position?
6. What additional things do the incoming officer need to know?

Incoming Officer Goal Setting

Congratulations on the new officer position! During or after you meet with the outgoing officer, it's important to do some goal setting and mapping out timelines of important things to be done at the start of your position. Please consider the following.

Name: _____

Term: _____

1. What concerns do you have about this position?
2. What are your expectations for yourself in this position this upcoming year?
3. What are some areas of growth do you see for this position?
4. What should be done as soon as you take the office?

Stretch v.s. SMART Goals

Stretch goals challenge us to think big while SMART goals require us to think critically about how we are going to accomplish our goals. Take a moment to reflect on some stretch goals for this position, and then use SMART goals to break the stretch goals down to more tangible tasks.

1. What are the biggest goals that you have set for yourself in this position this upcoming year?
2. How will I achieve this goal using SMART goals?
 - a. Specific Sub Goal?
 - b. How will I measure it?
 - c. How will this be achieved?
 - d. Is this a realistic goal?
 - e. What will be the timeline for this goal?