

Center for Student Engagement

Dunford Hall 2227

865-974-5455 | [go@utk.edu](mailto:go@utk.edu)

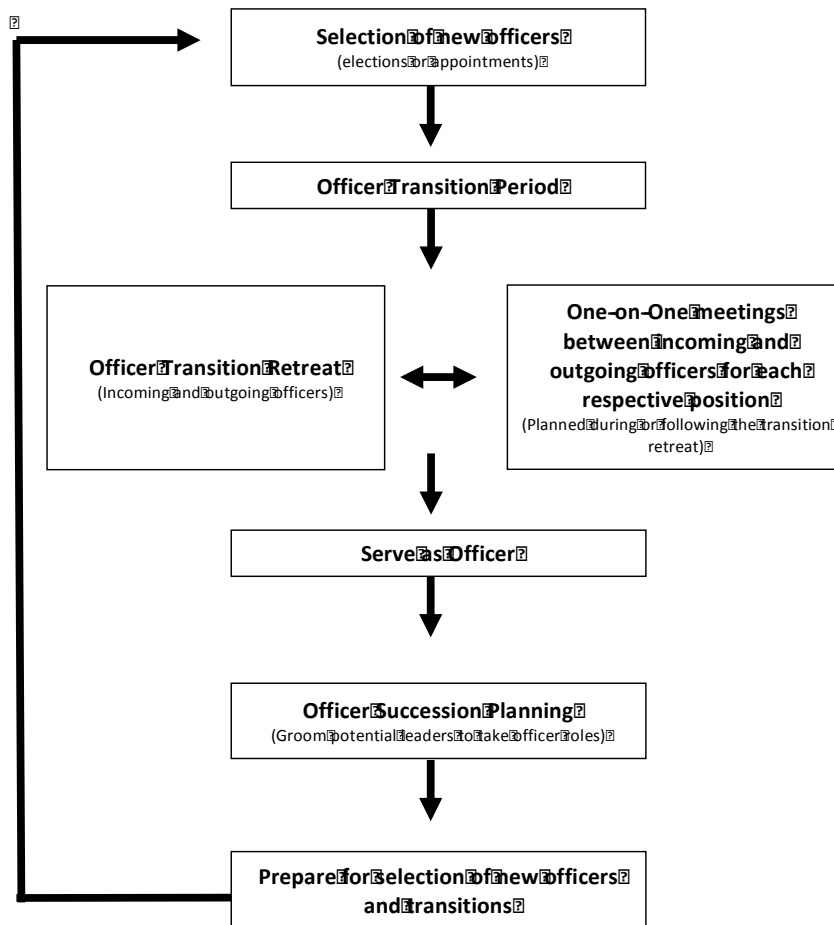
*The Effective Student Organization Officer Transition Guide will aid student organizations with a step-by-step process to positively impact the organization's ability to function successfully after the officer transition period.*

# Officer Transition Overview

An officer transition is a period of time between the selection of new officers (elections and/or appointments) and the point at which new officers assume their new role in an organization. As an outgoing officer, take time to consider how the transmission of information and detailed conversations with the incoming officer contributes to the success of the organization.

The following are key benefits of an effective officer transition:

- Maintains effective continuity of the organization’s progress, goals, and growth
- Helps ensure the successful transfer of important information
- Helps build upon the achievements of the outgoing officer team
- Reinforces positive/productive communication between officers and between Executive Boards and the Organization
- Provides an opportunity for incoming officers to plan for the future and establish new goals
- Creates an atmosphere where officers learn and work effectively



## Important Information for Organization Operations

Organizations should ensure they are maintaining all items related to the operations of the organization. It is important to pass along all account passwords, make changes on VOLink, be aware of allocated funding, and much more. The list below includes possible areas of Organization Operations essential to the success of the organization:

### Organization Operation Information

- Organization's History – photos, old documents, videos (if applicable)
- Yearly Review – including rosters, annual budgets, event evaluations, etc.
- Constitutions and/or Bylaws – (could include National Bylaws, if applicable)
- Organization Structure
- Advisor Contact Information
- Social Media Passwords and Administrative Rights
- Organization Calendar
- Registration with the Center for Student Engagement Requirements
- List of Annual Procedures
- Meeting Agendas and Minutes
- Marketing and Promotion Materials
- Room Reservations
- Ongoing and Current Projects or Committees
- Organization List-Serv and Updated Roster

### Financial Information

- Budgets
- Requirements with the Student Organization Business Office or Bank Account Information
  - o Transitioning Signature Cards over to Incoming Officers
- Student Programming Allocation Committee (SPAC) Allocated Events

## Outgoing Officer Questionnaire

The questions below are questions for the Incoming Officer to ask of Outgoing Officers in either Retreat or One-on-One Setting.

1. What do you consider to be the greatest responsibility of the office?
2. What were the greatest successes of the current year?
3. What were the greatest challenges of the current year?
4. What were the obstacles to performing my position responsibilities effectively?
5. Who or what were good resources for you?
6. What do you wish you would have been told before taking the officer position?
7. What challenges or areas will require my attention within the next year?
8. What should be one of my first tasks in the position?
9. What was the best part about holding your position?

## Student Organization Officer Goal Sheet

Developing sound goals is critical to managing your own and your organization's performance. Use the goal sheet below to create goals and establish goals for you and your organization during your time as an Officer.

Goals	Barriers	Resources to Use	Solutions to Problems	Timeline to Achieve Goals

## Student Organization Officer Transition Check List

*This checklist can be used by Student Organization Officers to ensure they are completing all tasks necessary for an effective Officer Transition.*

- Organize all notebooks, binders, files and electronic documents
- Provide a Copy of the Constitution or Bylaws including Committee Descriptions
- Finish all necessary correspondence (letters, emails, phone calls, etc.)
- Develop action plans and timelines for new officer transition, including but not limited to:
  - Necessary meetings attended and chaired by officer
  - Important tasks and operations
  - Introduction to key people/staff (relationship building)
- Complete the Outgoing Officer Questionnaire and review with the incoming officer
- Complete the Outgoing Officer Goals Worksheet and review with the incoming officer
- Create/update officer roles and responsibilities description (should be included in group constitution)
- One-on-one with incoming officer(s)
- Update VOLink Profiles and Social Media Profiles
- Clarify budget allocations and funding for events – including providing all account information
- One-on-One Meeting with Advisor(s) and the New Officer Team