

List of Suggested Tasks for Outgoing Student Affiliate Officers

- Create and update a Transition Binder (see description below) throughout the entire year.
- Organize your office, materials, thoughts, etc.
- Finish all correspondence that you can.
- Prepare an end-of-the-year report incorporating the organization's goals, activities, and accomplishments.
- Using the invaluable hindsight that you now have, identify the areas of responsibility, people, details, phone numbers, etc. that you wish someone had told you when you took office.
- Review the Organization's constitution, by-laws, written material, and goals and outline any areas needing attention or revision.
- Incorporate a formal transition into your Constitution and bylaws to ensure the continuity and effective functioning of the organization.
- When new officers have been elected, orient them together as a group with all of the outgoing officers. Include the organization's advisor in this process as well. This process provides the new leaders with an opportunity to understand each other's roles and to start building their leadership team. Outgoing officers should openly share what they believe went well and what they would change if they had it to do over again.
- Make introductions to resources. Schedule time to walk around campus with the new officers and introduce them to important people who can serve as key resources. In addition, make sure new officers meet with the organization's faculty/staff advisor.
- Do not “drop off the edge of the earth” - be available for consultation.

Guidelines for Preparing a Transition Binder

A binder can be a beneficial tool in orienting the new officers with all the functions and responsibilities of their positions. It should cover all aspects of officer responsibilities and how those tasks fit into the organization's big picture. Recommend that the new officers file "historical" documents in the binder (e.g., meeting minutes) when he/she has become comfortable with the information. Then, the binder can be used as a working tool rather than something to be completed at the

end of the year (usually during finals). The new officers will thank you throughout the year.

What to Keep in the Transition Binder:

• **Introduction**

- Table of contents
- Contact sheet for new leadership/membership
- Resources (faculty/staff advisor contact information, NCCTM information, Chapter login for NCCTM Website, other campus groups contact information)
- Calendar of events and deadlines
- Mission statement
- Goals and objectives
- History of organization and committee/program
- Job/position descriptions
- Organizational chart for organization
- Officer selection process information and timeline
- Membership recruitment information and timeline

• **Officer Position**

- Responsibilities - the "big picture"
- Procedures - the small details or the "how to's", including a list of things that need to be done immediately (e.g., register organization for on-campus status, etc.)
- Detailed position description
- Letter from former to new officer, including advice, experiences, what was improved upon this year, things to know when getting started, priorities. Letter is usually written informally.
- Blank "Bright Ideas" sheet to be used throughout the year; ideas that can help move the organization
- Current Goals
- For President and all other positions - A Chapter/Organization Resource Manual

• **Agendas and Minutes**

• **Membership Information (as appropriate)**

- List of members (students, paying (if required), others) and their contact information (e-mail, phone number)
- List of people expressing an interest but not joining/paying and their contact information
- Committee roster
- Membership application

- **Correspondence**

- Monthly mailings and e-mails for President
- Pertinent Listserv messages
- E-mails to the chapter/organization - pertinent to the positions
- E-mails from the advisor with important information

- **Progress Reports-Use for projects/committees to keep track of progress**

- Blank Progress Reports (to be completed throughout the year) with guidelines.
- A progress report provides the "working draft" for most of the transition binder. It provides for the officer/member to write down what is new or different, what has been improved upon, what is in progress, accomplishments, etc.
- Completed Progress Reports

- **By-Laws and Budget**

- Copy of the yearly budget sheet and any financial statements
- Copies of receipts
- Fundraising ideas/projects
- Copy of By-Laws and constitution of the Chapter/Organization

- **National Conference, State Conference, and Regional Activities (if appropriate)**

- Any materials pertinent to these events like brochures, fact sheets, agendas, information collected at the last event, etc.
- NCCTM information

- **Special Events**

- Sample posters/flyers from past projects, old press releases, Event Approval process instructions, Event Planning Guide, Campus events contact list
- Copies of all Chapter/Organization event materials (e.g., invitations, posters, awards, informative quarter sheets, etc.)
- Student/Organization specific run events (each semester or annual, etc.)
- Create a Master Calendar for the semester or year and plan out special events in advance.

- **Publications and Newsletters (if any)**

- **Contacts**

- Information for Campus Office and for NCCTM
- Have a binder insert for business cards
- Professional contacts in the area
- Chapter/Organization specific contacts

- **Miscellaneous Information**

- Set up a separate section of the binder for Miscellaneous Information
- Use this section for information that needs to be filed away and for keeping extra forms

- **Transition**

- Agendas and handouts from past training retreats or meetings
- University publications about officer transition
- Information on the "nuts and bolts" of the organization (such as financial matters, event planning, etc.)

List of Suggested Tasks for Incoming Officers

- Read Transition Binder and previous executive reports. Become familiar with the general history of the organization and its recent activities. Remember you need to know all of the little details as well as the big picture.
- Determine training and guidance you will need from the outgoing officers. This may not always be obvious, (e.g., it may be necessary for an incoming President to meet with the outgoing Treasurer).
- Make a list of the above information (general history, recent activities, goals, procedures, etc.) you might need to know to be successful.
- Try to generate more than one resource for each item that you want to learn about.
- Make appointments with key people.

Benefits of a Successful Leadership Transition

1. Provides for transfer of significant organizational knowledge.
2. Minimizes the confusion of leadership changeover.
3. Gives outgoing leaders a sense of closure.
4. Utilizes the valuable contributions of experienced leaders.
5. Helps incoming leadership absorb the special expertise of the outgoing leadership.
6. Increases the knowledge and confidence of the new leadership.
7. Minimizes the loss of momentum and accomplishment for the group.

Based on document from San Diego State University available at:
<<<http://sll.sdsu.edu/studentorgs/dev-pass-baton.html>>>