

Carnegie Mellon University



OFFICER TRANSITION GUIDE

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S.M.A.R.T. goals

PURPOSE

An Effective Officer Transition:

- Maintains seamless continuity of the organization's progress, goals, and growth
- Helps build upon the achievements of the outgoing Executive Board
- Reinforces productive communication between officers, and between the Executive Board and the membership
- Provides an opportunity for incoming officers to plan for the future and establish new goals

OVERVIEW

- Ensuring that there is a longer transition period for incoming officers to learn from previous officers is key to seamlessness
- All officers should be aware of upcoming training and commitments required of them from SLICE, national organization, governing bodies/councils and prioritize this education.
- Below is a sample timeline for when transitions should occur

OFFICER ELECTION AND TRANSITION TIMELINE

It is critical to continuously to a timeline throughout the role, rather than compiling at the end! A timeline can be a calendar, month to month diary-style, excel document, online task assignment tool with dates, etc.

One month prior to elections:

- Outgoing Officer Prepares for transition (1 hour)

Prior to elections:

- Have candidates meet with officers who are in roles that they might be interested in; the candidate should demonstrate that they know expectations of the role before running

Elections Occur; Installations Occur

1 week post-election:

- Incoming Officer prepares for transition (1 hour)
- Outgoing/ Incoming Officer 1-on-1 Meetings (1.5 hours)
- Incoming Officers witness previous executive board run an executive board meeting

2 weeks post-election:

- Executive board meeting is run by previous executive board and new executive board
- All Outgoing/ Incoming Officer group transition retreat (2-3 hours, depending on group size)

3 weeks post-election:

- New executive board runs an executive board meeting, witnessed by previous executive board
- Executive Board Planning
- Individual Officer Goal Setting

STEP 1: OUTGOING OFFICER PREPARES FOR TRANSITION: CHECKLIST

Making this a priority will ensure continuity and set example expectations for new officers

	Documentation	People	Tasks	Event- Specific	Time Orientation
	Organize all notebooks, binders, files and electronic drive files; Create/prepare/ Update Officer Manual	E-mail or in person introductions to key people (staff members, community partners, etc.)	Reserve spaces for annual, bi-annual, monthly, weekly events for incoming officer	Past presentations, agendas, curriculum, invoices (if applicable)	Detailed Calendars and Timelines
	Updated, electronic copies of all governing documents and strategic plans (constitution, bylaws, agreements, etc.)	Identify CMU stakeholders: staff and faculty, advisors, departments, other organizations, headquarters staff (if applicable)	Important Weekly, biweekly, monthly, semester, annual tasks; Who are they due to?	Descriptions of past events, planning checklists, risk management plans, statistics about event if applicable	Meeting(s) attendance: which meetings?, how frequent?, how long?, who is the in the room?, purpose, expectations
	Archive old versions of governing documents	Outgoing officer contact information	Finish all necessary correspondence (e-mails, phone calls, financial transactions etc.)	When to start planning events: room reservations, contacting faculty/staff/constituents, budget, announcement to community, trainings, review of policy, etc.	Campus events to be aware of that may impact availability of space (i.e. Scotty Saturday, Homecoming, Carnival, classroom space reservation release)
	Budget for position and corresponding historical line items and costs	Committee member contact information	Update The Bridge: roster and positions	Electronic copies of posters/flyers/t-shirts designs/newsletters/marketing	Timeline for fidelity check of event planning
	Position responsibilities	Identify your active, graduated and inactive members	Identify training dates such as authorized signer training and other training / conference requirements		
	Asset list (equipment, supplies, brochures, inventory)		Set up information tracked about members (service hours, fines, etc.)		
	Meeting minutes and sample agenda				
	Any login information or passwords (e-mail, social media, website)				

OUT GOING OFFICER WORKSHEET

TO BE COMPLETED PRIOR TO TRANSITION MEETINGS. Please think through and respond to the following questions regarding your responsibilities; think back to your own transition, what occurred and did not occur? This information will be helpful for your successor.

1. The most valuable thing(s) I learned about doing my position effectively is/are...
2. Obstacles to performing my position responsibilities effectively were...
3. Something(s) I tried that did not work are... They did it not work because....
4. Things that helped me better handle the responsibilities of the position were...
5. Things I wish I'd known before I took office were...
6. A mistake that could have been avoided is... it could have been avoided by...
7. If I had to divide my responsibilities into a pie chart of hat I actually did and one of what I wish I did...
8. What do you consider to be the greatest responsibilities of your office?
9. How can this position have a greater impact on the organization?
10. When I needed help these were my resources...

STEP 2: INCOMING OFFICER PREPARES FOR THE TRANSITION

INCOMING OFFICER CHECKLIST

- Review the sections of the Constitution and Bylaws and other policies that apply to your position
- Complete the Incoming Officer Worksheet
- Have a one-on-one meeting with the outgoing officer
- Read the officer materials provided by the outgoing officer
- Attend the group transition retreat

INCOMING OFFICER WORKSHEET

TO BE COMPLETED PRIOR TO TRANSITION MEETINGS. Please think through and respond to the following

1. What position-specific things do I want to know about (i.e. forms, reports, meetings, events, timelines, duties, etc.)?
2. Things I feel I should do in the next month...
3. People I should get to know...
4. Resources and services I need to know about...
5. Things I need to know about working with my Advisor?
6. What is your self-care plan?
7. Things I need to know about working with our governing body (policy, processes)?
8. What are your expectations for yourself in this position?
9. What expectations do you have for the rest of the Executive Council?
10. What expectations do you believe others have of you?

STEP 3: OUTGOING & INCOMING OFFICERS HAVE A ONE-ON-ONE MEETING

The following will help guide your conversation by focusing on past accomplishments and providing a critical evaluation of the past year in office. A suggested length is about an hour; being thorough will ensure greatest continuity.

Agenda

- Review responsibilities of the position
- Review timeline for completing duties of the position
- Transition of officer materials to the incoming officer
- Major accomplishments over the past year
- Unfinished projects
- Opportunities for improvement
- Important resources and contacts
- Outgoing officer contact information (in case more questions arise)

STEP 4: OUTGOING & INCOMING OFFICERS ATTEND GROUP TRANSITION RETREAT

Participants

The following is a list of suggested participants:

- Outgoing Executive Council Members *(Required)*
- Incoming Executive Council Members *(Required)*
- Advisor *(Highly Recommended)*

Location

Regardless of whether you choose to host the meeting on or off campus, it is important to choose a location that is free of distractions and interruptions from brothers and friends. When selecting your location, you can consider anywhere from a classroom on campus to a retreat site for the weekend; just be sure to clearly communicate the time commitment to all participants far enough in advance.

Length

Based on the activities included in Transition Meeting Agenda, the officer transition meeting will take between 2.5 and 3.5 hours to complete. Your individual retreat may vary depending on what activities your chapter chooses to include. When planning for the meeting, be sure to clearly communicate the time commitment to all participants far enough in advance to avoid scheduling conflicts.

Facilitator

Choosing the right facilitator is extremely important. Often, officer transition meetings are more effective when a person who is not a member of the organization is asked to facilitate. When choosing a facilitator, consider utilizing your SLICE advisor, Housefellow, CLC, a member of the governing council or even a campus professional.

STEP 5: NEW EXECUTIVE BOARD GOAL SETTING

1. What is the purpose of the organization?
2. How are we going to fulfil that purpose?
3. What are the initiatives from the previous executive board that should be continued?
4. What would you like to achieve this year?
5. What do you need to prioritize?
6. Action Items:

STEP 6: INDIVIDUAL OFFICER GOAL SETTING

What legacy would you like to leave in this organization?

Identify your top priorities.

What does accomplishing those priorities look like?

S.M.A.R.T. GOALS

Goal Theme	Specific	Measureable	Attainable	Realistic	Timely
Goal 1:					
Goal 2:					
Goal 3:					
Goal 4:					