

# SUCCESSFUL OFFICER TRANSITION

*Officer transitions are a key part of a successful organization. The purpose of this transition process is to ensure that the new officers are as ready as they can be to continue to provide the organization with strong leadership.*

- Outgoing/  
incoming  
officer  
exchange
- 1. Transfer of knowledge:** *the complete transfer of all personal expertise, knowledge, and experiences based upon outgoing officer position/role*
    - Effective leadership qualities and skills
    - Share problems, helpful ideas, procedures, and recommendations
    - Go through personal and organizational files and notebooks
    - Acquaint new officers with physical environment, supplies, equipment, and related personnel
    - Make sure that the new officers know the absolutely required functions of the organization (e.g. national reports, financial statements, etc.)
  - 2. Transfer of records:** *the complete transfer of all written and electronic information*
    - Constitution and By-Laws
    - Status reports for on-going projects
    - Evaluations of previous projects/programs
    - Previous minutes and reports
    - Organization member and contact lists
    - Alumni list
    - Financial books and records
    - Officer and committee job description
    - Officer notebook
  - 3. Evaluation:** *assess knowledge and record information in order to set goals for the coming year*
    - Review mid-year and annual reports
    - Review expenditures for organization
    - Consider successes and opportunities from past year
  - 4. Goal setting:** *set goals you would like to achieve for the upcoming year*
    - Individual officer/personal goals
    - Group goals for organization
- New leader  
officer/team
- All
- 5. Follow-through:** *All officers must follow-through on steps 1-4 in order to ensure a successful transition and bright future for the organization.*

