

## ***What is an Officer Transition Meeting/Retreat?***

A retreat or meeting away from the organization is a necessity before officers turn over. It provides the outgoing officers the opportunity to ensure that the programs, policies, and success of your term do not diminish with the next administration. Furthermore, it provides the incoming officers the opportunity to learn what his/her responsibilities are and prevents the new officer from having to reinvent the wheel.

An officer transition meeting/retreat can be:

- A meeting with the newly-elected and outgoing officers (all together)
- A meeting between the newly-elected and outgoing officers (one on one)
- A retreat during which newly-elected and outgoing officers meet for one day (or just a morning or afternoon), while the newly-elected officers meet for a second day to brainstorm goals
- An informal information gathering session during which new officers gather and record information and knowledge from outgoing officers/seniors

So where do you begin? Here are a few thoughts to keep in mind when planning a retreat or meeting.

- Request that all outgoing and incoming officers be present for the transition meeting/retreat. Provide at least 2-3 weeks notice for all officers.
- Contact your organization's advisor and be sure he/she and the advising team are aware of the date. Provide at least 2-3 weeks notice for all advisors.
- Reserve a room on campus or elsewhere at least 3 weeks in advance.
- Will there be any budgetary concerns? If so, be sure to speak with the treasurer. Will you serve lunch? Snacks? Any office supplies? (Butcher paper? Markers? Tape?)
- What will the length of the retreat be? Will goal setting be an aspect of the transition retreat?

## ***Preparation for the Transition Meeting/Retreat***

### **I. Officer Transition Binder**

One of the most important pieces to a successful transition is a thorough officer transition binder. Better yet, electronic files of everything done within the position before. An Officer Transition Binder should include the following information:

- a. The officer manual for the position/job description/duties and responsibilities
- b. Copy of the organization's constitution & bylaws
- c. Copy of officer responsibilities as stated in the constitution & bylaws
- d. All current forms relative to the office

(over)

- e. Record of activities over the past year
- f. Calendar of the past year
- g. Recommendations for the coming year
- h. Resources relevant to the office
- i. Other pertinent campus information
- j. A letter to the next officer.

At the end of each term, officers should update and revise the information in their notebook and pass along the notebook to the next incoming officer. If done correctly the Officer Transition Binder can provide greater longevity to the position and ultimately, to the organization.

Before the Officer Transition Meeting or Retreat, instruct your outgoing executive officers to update, add to, and revise his/her binder. If your current executive officers never received transition materials, it's never too late to start! Start making one right now! Hint: Encourage your executive members to begin saving things for the transition binder at the beginning of the year. It's very easy to create a folder on the desktop and save pertinent information. This makes the creation of the binder/electronic files easier at the end of the year.

## II. Outgoing Officer Worksheets

Before the Meeting/Retreat, request that outgoing officers review their terms and fill out the *Outgoing Officer Transition Worksheet* prior to the retreat/meeting. Potential questions to address include:

- a. What problems or stumbling blocks did you encounter as an officer?
- b. How were these problems or stumbling blocks dealt with?
- c. What aspect(s) of the term went really well?
- d. What recommendations do you have for the incoming officer?
- e. What unfinished business must be addressed?

Have the outgoing officers bring their completed worksheets to the meeting/retreat.

## III. Incoming Officer Worksheets

Before the Meeting/Retreat, request that incoming officers think about their upcoming terms and complete the *Incoming Officer Transition Worksheet* prior to the retreat/meeting. Potential questions to address include:

- a. What is the purpose of my office?
- b. What are my responsibilities?
- c. How can I improve what the former officer accomplished?
- d. What new/old programs do I plan to use during my term?
- e. What are 3 goals I want to accomplish in the short term?
  - What action items I must accomplish to complete these short term goals?
  - What is the projected date of completion for these goals?
- f. What are 3 goals I want to accomplish in the long term?
  - What action items I must accomplish to complete these long term goals?
  - What is the projected date of completion for these goals?
- g. What will be your greatest challenges in holding this office?

Have the incoming officers bring their completed worksheets to the meeting/ret

This is one of many handouts available to you. Feel free to meet with any Student Activities staff member for more details about this topic or any others related to leadership or your student organization. We also have open advising hours every Wednesday from 3 p.m to 6 p.m. The Office of Student Activities is located in the University Center, on the 2<sup>nd</sup> floor, or by telephone at (503) 370-6463. Visit our website at [www.willamette.edu/dept/osa](http://www.willamette.edu/dept/osa) or email us at [wustudentinvolvement@gmail.com](mailto:wustudentinvolvement@gmail.com). This document was adapted from the Office of Student Involvement and Leadership, University of Kansas.

Updated 08/09

# Sample Agenda for Officer Transition Meeting/Retreat

## 1. Introduction/Overview of Agenda

*Having an established agenda is important for a lot of people. First, it helps offer reassurance their time will not be wasted at the meeting/retreat. Second, it helps keep things on track and gives direction for the conversations. Having scheduled breaks is a good way to keep people focused – they'll know that there will be time(s) to be a bit more unfocused. It can also be helpful to have an "open agenda" item on your established agenda. This gives scheduled space for a group member to bring up a topic or idea that might not have been addressed. Without this, you might find that someone brings up topics they want to discuss when you are trying to keep on track with the agenda.*

## 2. Team Builders and/or Ice Breakers

*It is inevitable that you will hear some groans and complaints when you suggest doing an ice breaker/team builder; however, these "games" often serve a great purpose when initially forming a group. An icebreaker gives group members the opportunity to get comfortable with one another a bit more quickly than they would otherwise. Playing some sort of name game is good if there are a lot of people who don't already know one another.*

## 3. Establish Group Norms

*This is an important step that sets the tone for the entire year. Setting group norms allows group members to establish the expectations for how the group will function as a whole. These expectations should be determined **by the group**, for the group. Norms have a much greater effect if each member has some ownership over the decision process. If the president or the advisor brings a list of pre-determined norms, those are often viewed like "rules and regulations" vs. "norms or expectations".*

## 4. One-on-one meetings between old and new officers

*Outgoing officers pair up with their respective incoming officer to:*

- *give the incoming officer the transition binder and review job responsibilities – also to instruct the new officer on best practices/challenges of the position.*
- *share the completed Outgoing Officer Worksheet and Incoming Officer Worksheet with one another to discuss the answers to each.*

## 5. Return to a large group and have a lesson on SMART Goals

*See SMART Goals below*

## 6. Officer goal setting (short and long term)

*Outgoing officers should pair with his/her respective incoming officer to develop short and long term goals together*

## 7. Officers report their goals to the group

*Return to large group to have each incoming officer report out their goals for the coming year – this is a good time to identify areas in which goals overlap and determine if there are areas for collaboration.*

## 8. Roundtable discussion and open agenda items

*Have each member of the group share his/her thoughts/feelings of the moment. What pieces of advice to the outgoing members have? What concerns or questions do the incoming members have?*

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