



*Office of Student Involvement & Leadership*  
Student Organization  
Transition Workbook



THE UNIVERSITY *of*  
NEW ORLEANS

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# *Student Organization Transition Workbook*

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## Why plan a leadership transition?

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- Provide for the transfer of significant organizational knowledge.
- Minimizes the confusion of leadership changeover.
- Gives outgoing leaders a sense of closure.
- Celebrates the valuable contributions of experienced leaders.
- Helps incoming leadership absorb the special expertise of the outgoing leadership.
- Increases the knowledge and confidence of the new leadership.
- Minimizes the loss of momentum and accomplishments for the group.

## Outgoing Officer Checklist

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- Organize all notebooks, binders, files, and electronic documents
- Finish and forward all necessary correspondence
- Develop timelines for new officer transition including important tasks and traditions  
Provide information for key people and offices for the position to know
- Complete outgoing officer worksheets

## New Officer Binder Materials

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A binder/electronic copies of the following materials should be compiled and given to the incoming officer:

### Important Contacts

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- Outgoing officer's contact information (in case there are questions)
- Other student organization contacts
- UNO staff contacts (campus advisor, SIL, etc)

### Documents

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- Constitution and by-laws
- Organizational goals and objectives from previous year(s)
- Job descriptions/role clarification
- Evaluations of previous projects and programs
- Previous minutes and reports
- Resources/contact lists
- Financial records, budgets
- Log-in information

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# *Outgoing Officer Worksheet*

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To be completed prior to transition meetings. Please consider and respond to the following questions regarding this position's responsibilities. This information will be helpful to the incoming officer.

What I liked most about my position...

What I liked least about my position...

The most difficult decision I made was...

What I could have done to make the experience better...

Things that made it easier to complete my responsibilities...

What made it difficult to complete my responsibilities...

Things I wish I'd known before I took officer were...

One University policy I didn't expect or really had trouble with was...

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# *Outgoing Officer Worksheet*

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To be completed prior to transition meetings. Please consider and respond to the following questions regarding this position's responsibilities. This information will be helpful to the incoming officer.

What do you perceive to be our organization's objectives?

What do you consider to be the responsibility of your office?

What do you wish you had done, but did not?

What did you try that did not work? Why did it not work?

What problems or areas will require attention in the next year?

Who was the most helpful in getting things done? (Who were good resources?)

What should be done immediately?

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# *Outgoing Officer Worksheet*

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<b>Accomplishment</b>	<b>Barriers/Limitations</b>	<b>Resources Used</b>	<b>Solutions to Problems</b>

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# *Incoming Officer Worksheet*

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To be completed prior to transition meetings. Please consider and respond to the following questions. This information will be helpful as you plan for your new role.

What position-specific questions do I want to know about (timelines, duties, etc.)?

Things I should do or want to do over the summer...

Other students, faculty, and staff I should get to know...

Resources and services I need to know about...

Things I need to know about working with my campus advisor...

Other questions I want answered...

One University policy I really want to know about...

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# *Incoming Officer Worksheet*

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To be completed prior to transition meetings. Please consider and respond to the following questions. This information will be helpful as you plan for your new role.

What do you perceive to be our organization's objectives and goals (short-term and long-term)? (See next page.)

What do you consider to be the responsibility of your office?

What are your expectations of yourself in this office?

What expectations do you have of the rest of the Executive Board?

What expectations do you believe others have of you?

What problems or areas will require your attention in the next year?

What should be done immediately?

Who do you anticipate being the most helpful in getting things done?

Write down one specific problem you anticipate encountering and how you will go about overcoming it.

# Incoming Officer Worksheet

Goals need to be SMART:

*S - specific, significant, stretching*

*M - measurable, meaningful, motivational*

*A - agreed upon, attainable, achievable, acceptable, action-oriented*

*R - realistic, relevant, reasonable, rewarding, results-oriented*

*T - time-based, timely, tangible, trackable*

Goal	Action Items	Necessary Resources	Projected Completion
Short-term goal:			
Short-term goal:			
Long-term goal:			
Long-term goal:			
Long-term goal:			