

Student Organization Officer(s) Transitioning 101

Start Early, Communicate, Write It Down, and Pass It On!

Tips for Successful Transitions:

- Have a transition planning meeting
- Introduce new officers to key contacts
 - Advisors, community partners, UNC administrators
- Technology orientation
 - Update new positions/names in Student Life
 - Provide information regarding your org's usage of their webpage
- Create a Transition Notebook
- Fulfill outstanding obligations (especially financial)

Transitioning Methods:

- Documentation/record-keeping of all important information
- Shadowing
- Meetings / parties / retreats
 - Relaying information face-to-face
 - It's important to acknowledge and celebrate the past of the organization and energize for the future
- Reflection
 - On past events, future goals, critical questions

Successful Transitions:

- Preserve important information and relationships
- Build and learn from past successes and mistakes
- Allow for continuity and stability of the organization
- Keep members excited about the organization
- Follow a plan!

Transitioning Document Example

Questions to reflect on:

What worked well this year in your position? What didn't work as well?

What tips can you give about the culture of the organization? (preferred meeting times, places, agenda, social events, etc.)

What on-going commitments does the person who is coming into your position need to know about?

What are some suggestions you have for the next person in your position?

Who have been your most successful partners? Who else could you have worked with to build your organization and reach more students?

For outgoing leaders:

Before I started, I wish I knew...

My transition to my position would have been easier if...

The resources I found most helpful during my position were...

For incoming leaders:

Regarding my new position, I am nervous about...

Before I start, I would like to know...

I plan to prepare for my new position by...