



Rotaract District 6710, Kentucky, USA

Officer Transition

Adapted from University of Kentucky Office of Leadership Development

Leadership is change. Leaders seek to create change by guiding others toward achieving individual and group goals and objectives. Leaders must learn to cope with personal change and understand the tendency of others to resist change. Included in this handout are means of reducing resistance to change in personal life and organizations.

The transition of leadership for your student organization can be smooth or a complete disaster and may determine the effectiveness of the organization for years to come. Making the transition is the responsibility of the current leadership as well as the new officers. The passage of knowledge of knowledge, experience, accomplishments, and goals for student organizations will help the current officers gain a sense of completing their jobs and bring closure to their experience, while at the same time, giving the new officers valuable information, advice and confidence for the future.

Pre-Election Activity

Changing leadership can be either an exciting or confusing time for organizations, depending on how much planning is put into the election/selection of new officers. Good planning makes the transition smooth and informative for all members. You can begin this process a month or two prior to elections by:

- Encouraging outgoing officers to identify potential leaders in the current membership.
- Having the present officers spend time with potential leaders and share position responsibilities and idiosyncrasies.
- Explaining structure and details of positions at a general meeting prior to nominations to give members adequate time to decide if they are interested. This will also give everyone a better sense of who is eligible, qualified, and interested.

The current officers play a key role by maintaining a high degree of continuity during this vital period in the group's development. Their attitudes and behaviors have a great impact on potential officers and general members. Outgoing officers who have little time for members or who seem tired and malcontent send a signal to members that being an officer of the organization is not worth their effort.

Nominations and Elections

Prepare for officer election/selection early in the semester. New officers are typically elected/selected in the middle of spring semester, but can be chosen anytime during the year. Officers may need to resign throughout the year causing the need for a special election. Make sure the process is clear and follows your organization's constitution. All Rotaract elections should take place prior to the spring conference each year.

Provide members a brief summary of the duties and qualifications of each position (a printed job description can be useful). Outline the election process and announce the date of the election. When making nominations, members should look for a diverse group of candidates and avoid selecting a group of people who all think alike. A good balance of executives with different operating styles allows the organization to be more creative and progressive. The election process should be designed with the feelings of the unsuccessful candidates in mind. For this reason, secret ballots should be encouraged. Candidates should be given a training schedule and transition structure prior to the election. It is advisable to have candidates make a commitment to attend all post-election activities

Post-Election Activities

The key to ensuring a successful transition is to make sure new officers are oriented to their jobs before taking office. Post-election activities are the heart of the leadership success. Special new officer training events should be planned by the outgoing officers or experienced members.

The new officers need to get a historical perspective of the organization that includes a review of formal documents, policies, procedures, traditions, and background information. The new officers should review the previous year's goals, projects, and activities. They should also examine the organization's financial records and discuss rationale for budget allocation. It is important that each position has a written job description that outlines specific duties, obligations, time-lines and roles they will take on in the upcoming year. It is important to introduce the officers to key people you worked with on campus or in the community. In addition, some time should be spent on team-building exercises with the new officers to help them develop as a cohesive unit and provide them with the basic knowledge to be successful.

Below is a list of what to transfer from your old officers to the new leadership. If you discover that your organization can't share some of the information because these items don't exist, remember that it is never too late to start documenting.

Personal Expertise, Knowledge and Experience

- Share problems and helpful ideas, procedures, and recommendations.
- Write or share reports containing traditions, ideas, or completed projects, continuing projects, concerns, loose ends, ideas that came up but were never implemented, past fundraisers etc.
- Go through personal and organizational files together.
- If you have an office or regular meeting space, acquaint new officers with physical environment

Areas of Knowledge of Organization's Structure, Goals and Past Accomplishments

- Constitution and Bylaws
- Job Descriptions
- Status reports on current & continuing projects
- Evaluations of previous projects/programs
- Meeting minutes and agendas
- Resources or contact lists
- Members list
- Financial records and books

Start a New Transition with Goal-Setting

It is important that new officers be aware of the goals of the organization when they begin their new positions. An advisor or outgoing officer can provide continuity by reviewing with the officers past goals, projects, activities, and evaluating their successes and failures. Even if formal goals were not written down, the organization probably had some direction or objectives the officers tried to accomplish. It is always better to have goals written down so members have a clear vision of the organization. The advisor or past officers can help facilitate goal-setting processes whereby new officers and members can set goals for the upcoming year. It is important goals are set with all members. Just as the new officers may have trouble with the outgoing officers imposing goals on them, members may have problems with goals imposed on them by the new officers.

Ensuring that new officers are prepared for their future term is important in the success of the organization.

The following are tips to ensure a smooth transition between officers:

1. **Offer great invitations** – identify members who you feel could make a great contribution to the organization in a leadership position and encourage them to run for an executive office
2. **Schedule time for officer shadowing** – allow new members to shadow outgoing officers to gain a greater understanding for their anticipated position

3. **Allow outgoing officers to supervise new members** – plan for new members to plan a small program under the supervision of outgoing officers
4. **Provide new members with a record/handbook** – this handbook should chronicle past projects and responsibilities, outlining the process of accomplishing various objectives
5. **Offer suggestions for the future** – outgoing officers should discuss past successes and failures so that new officers can learn from your experience and make improvements

Facilitating Transition in your Organization

Unfortunately, many officers graduate or move on when they have just begun to know the systems, policies, and procedures which make them effective. There are several ways to facilitate leadership transition.

1. Hold a transition workshop each year where advisors and former members present information to current members and perspective officers about organization history, goals, and traditions.
2. Have officers prepare handbooks, manuals, or binders describing position responsibilities for new officers to review.
3. Elect new officers a month or two before the current officers' terms end so they can shadow their counterparts and learn the system.
4. Create a mentoring relationship where experienced members assist new members in learning organizational history and leadership skills.
5. Develop learning contracts that outline a list of skills that officers agree to acquire by attending seminars or work-shops.

Creating a Transition Handbook

1. Introduction: Table of contents, contact or address list for new leadership/membership, birthday list, etc.
2. Historical Documents: Constitution, mission statement, goals and objectives, history of organization and committee/program, organizational chart for organization and job descriptions, election-process information (and time line) and membership recruitment information (and time line).
3. Progress Reports: A progress report should be completed by each officer in the organization to record what is new or different, what has been improved upon, progress, accomplishments, etc.
4. Training Information: Agendas and handouts from past training retreats or meetings, information on the "how to" of the organization (such as publicity, financial matters, etc.).
5. Organizational Information: Calendar of events, meeting agendas and minutes, evaluation with explicit recommendations, and detailed planning time lines.