STUDENT OFFICER TRANSITION GUIDE

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INTRODUCTION

PURPOSE

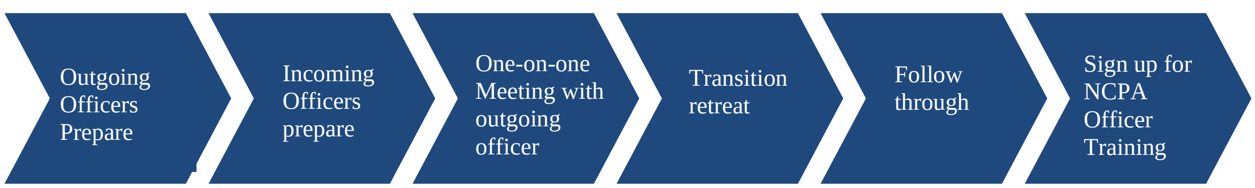
Smooth and successful transitioning is the key to maintaining a strong organization from year to year. Succeeding officers must be provided with the necessary information to carry on their responsibilities. There should be a time of officer overlap before the current officer leaves to provide an opportunity for training. Additionally, many chapters elect leaders who are ill- equipped to fulfill their responsibilities. Finally, even if the right people are elected, chapters often spend too little time in the transition stage and new officers consequently spend too much of their time acclimating to their new role.

Without the right preparation and support, these variables can hinder a chapter's long-term success.

A successful and effective transition can:

- Establish effective continuity of the chapter's progress, goals and growth.
- Ensure the successful transfer of important information.
- Build upon the achievements of the outgoing executive board.
- Re-enforce positive/productive communication between chapter leaders and the chapter.
- Engage volunteers to support the growth and development of the executive board and the chapter.
- Provide an opportunity for incoming officers to plan for the future and establish new goals.

A successful transition process is broken down into six steps:



This guide outlines what you need to know about each of the six steps. Utilizing this will ensure your chapter reaps the benefits listed above. Should you have questions or need support, contact studentaffairs@ncpanet.org

Transition Process: Six Steps

STEP 1: OUTGOING OFFICERS PREPARE FOR TRANSITION

INTRODUCTION

Preparation drives the success of the transition process. With proper organization and thoughtful reflection, outgoing officers will provide a strong foundation for their successors.

Implementing the steps in this section will maximize the impact and effectiveness of the remaining transition process.

OUTGOING OFFICER CHECKLIST

- ☐ Organize all notebooks, binders, files and electronic documents.
- ☐ Finish all necessary correspondence (letters, e-mails, phone calls, etc.).
- ☐ Develop action plans and timelines for new officer transition, including but not limited to:
    - Necessary meetings attended and chaired by the officer.
    - Important tasks.
    - Introductions to key people/staff (relationship building).
- ☐ Complete the Outgoing Officer Worksheet.
- ☐ Create/prepare/update Officer Manual.
- ☐ Schedule a one-on-one meeting with the incoming officer.
- ☐ Provide the Officer Manual and Outgoing Officer Worksheet to the incoming officer 48 hours prior to the one-on-one meeting.
- ☐ If necessary, follow-up on specific action items from the one-on-one meeting.
- ☐ Have a one-on-one meeting with the incoming officer.

OFFICER MANUAL – WHAT TO INCLUDE

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

PEOPLE

- Outgoing executive board contact information.
- Volunteer contact information.
- Committee members and contact information.
- University staff contacts (individual responsible for room reservations, etc.).
- Regional director and other Headquarters staff contact information.
- If applicable, vendor contacts (third-party vendors, t-shirt companies, etc.)

DOCUMENTATION

- Relevant resources from NCPA, leadership events and other training programs.
- Position responsibilities
- Electronic copies of all important documents (i.e., policies, procedures, Bylaws, etc.).
- Calendars/timelines.
- Electronic copies of posters/flyers/t-shirt designs/newsletters.
- Committee meeting agendas.
- Committee meeting minutes.
- Templates for forms/letters/e-mails.
- If applicable:
  - Any login information or passwords (i.e., Facebook, Instagram, Twitter, etc.).
  - Budgets from prior years.
  - Financial documents (i.e., receipts, invoices, etc.).
  - Asset list (i.e., supplies, t-shirts, brochures, etc.).
  - Chapter checking and savings account information.

KEY ACTIVITIES, INITIATIVES & EVENTS

- Information for any past vendors used (i.e., caterers, hotels, transportation services, printers, t-shirt companies, etc.).
- Descriptions of past events, planning checklists, risk, etc.
- Status update and next steps on current projects and initiatives.

WORDS OF WISDOM

- Mistakes you made that could have been avoided.
- Advice you wish you had before assuming office last year.
- Questions the new officer may have.

A key point to remember is that you should always leave the organization better than you found it. Remember your previous frustrations and issues and keep good notes throughout the year to pass along to the next officer.

You should leverage technology to make the transition process seamless. Using Google Drive allows you to create folders for each officer position making it easy to pass on important documents and resources year after year. Outgoing officers should provide login/password information to their successors during the transition process.

STEP 2: INCOMING OFFICERS PREPARE FOR TRANSITION

INTRODUCTION

The first steps taken by an incoming officer dictate their performance for the next year. Proper preparation on day one lays a foundation for future success. Completing the steps in this checklist will ensure incoming officers start their term with the best foot forward.

INCOMING OFFICER CHECKLIST

- [ ] Review the Student Chapter Operations Manuel for your position.
- [ ] Complete the Incoming Officer Worksheet.
- [ ] Read the Outgoing Officer Worksheet provided by the outgoing officer prior to one-on- one transition meeting.
- [ ] Have a one-on-one meeting with the outgoing officer.
- [ ] Revisit the Outgoing Officer and Incoming Officer Worksheets as needed.
- [ ] If necessary, follow-up on specific action items from the one-on-one meeting.
- [ ] Prepare for and attend the incoming officer transition retreat.
- [ ] Prepare for and attend the NCPA Officer Training.

STEP 3: OUTGOING & INCOMING OFFICERS HOLD ONE-ON-ONE MEETINGS

INTRODUCTION

A smooth handoff from one officer to the next ensures continuity, maximizes time and resources, and drives future success. The sections below will guide your discussions and ensure a comprehensive transition.

PREPARATION

- Outgoing officer completes the Officer Manual and Outgoing Officer Worksheet.
- Incoming officer completes the Incoming Officer Worksheet.
- Schedule at least an hour in a quiet location, free from outside distractions.
- Outgoing officer sends completed copies of the Officer Manual and Outgoing Officer Worksheet to incoming officer at least 48 hours prior to the meeting.
- Incoming officer reviews completed copies of the Officer Manual and Outgoing Officer Worksheet prior to the scheduled meeting.
- Both officers bring hard copies of the mentioned resources.

AGENDA

- Outgoing officer walks through each section of the Officer Manual.
- Outgoing officer walks through each question and answer in their completed Outgoing Officer Worksheet.
- Incoming officer walks through each question and answer in their completed Incoming Officer Worksheet asking questions and getting feedback from outgoing officer.
- Incoming officer takes notes throughout, capturing specific items that need follow-up or additional attention.
- At the conclusion of the meeting, both officers discuss major takeaways and capture specific action items. The incoming officer should document this information and send it out via email for follow-up.

FOLLOW-UP

- Outgoing officer provides additional materials or requests to incoming officer within five days of the meeting.
- Incoming officer makes contact with chapter advisor (if applicable) to discuss the major takeaways from the meeting.

STEP 4: INCOMING OFFICERS TRANSITION RETREAT

INTRODUCTION

This meeting serves as an opportunity to build team dynamics and ensures all officers are on the same page headed into the new year. When done correctly, incoming officers leave empowered and prepared to tackle the challenges and opportunities ahead.

While some chapters include outgoing officers in transition retreats, it's important to have time allotted for incoming officers to build relationships, goals and action plans by themselves. This prevents incoming officers from using outgoing officers as a crutch and allows the new leaders to build their vision for the chapter they will be serving the next 11 months.

The sections below outline the preparation and components of a successful officer retreat. If your chapter decides to use a different format, please ensure it achieves the same outcomes of the process below.

INTENDED OUTCOMES

- Create a sense of significance for an effective transition.
- Identity the chapter's strengths, weaknesses and opportunities for improvement.
- Set clear short-term and long-term action plans for each officer that drive the overall success of a chapter.

PARTICIPANTS

- Incoming executive board members (required).
- Chapter advisor (highly recommended).
- NCPA Resident (recommended if their schedule permits).

SUPPLIES

Incoming officers should bring:

- A hard copy of their Student Chapter Operations Manuel
- Completed Outgoing Officer and Incoming Officer Worksheets.
- Any additional notes from the transition process.
- Pen and paper.
- Laptop and charger.

President or Advisor should bring:

- Markers, flip chart, masking tape, easel. Etc.
- A laptop and charger to show media clips.
- Hard copies for each participant of:
  - Evaluation and Prioritization Worksheet.
  - Example - Evaluation and Prioritization Worksheet.
- Snacks and/or meal.
- Supplies for icebreakers or games (optional).

LOCATION

Regardless of whether you choose to host the meeting on- or off-campus, it is important to choose a location that is free of distractions and interruptions.

SCHEDULING & DURATION

Based on the activities included in your individual retreat, the time to complete may vary depending on what activities your chapter chooses to include and how deep officers engage into discussions.

When planning for the meeting, be sure to clearly communicate the time frame to all participants far enough in advance to avoid scheduling conflicts.

TIPS FOR SUCCESS

- Work with incoming officers immediately following elections to establish a mutually beneficial date for all participants.
- Hold the retreat before the summer break or find a time during the break to meet. At the latest, ensure this retreat is completed before the NCPA Officer training.
- Coordinate with the NCPA Resident to determine if they can attend.

STEP 5: FOLLOW THROUGH

INTRODUCTION

To ensure you maximize the full potential of the previous four steps, officers must follow through on the commitments they've made. The section below outlines the key steps in priority order.

KEYS TO FOLLOWING THROUGH

- All officers should email their completed Evaluation and Prioritization Worksheet to the chapter president following the incoming officer's transition retreat.
- The chapter president shall compile all of these goals and email them to your advisor
- Each chapter officer should discuss their completed Evaluation and Prioritization Worksheet to the entire chapter at the first chapter meeting following the retreat.
- At every executive board meeting Chapter officer should revisit their Evaluation and Prioritization Worksheet monthly and adjust as needed.
- Each chapter officer should provide monthly updates at chapter meetings to show progress and create excitement.

STEP 6: ATTEND THE NCPA OFFICER TRAINING

INTRODUCTION

Every Fall NCPA will hold an officer training event that each chapter officer will be able to enroll in. This will be a great opportunity to see what new opportunities are available for the chapter and to get to know other members across the nation.

PREPARATION

To ensure you maximize the potential of your officer duties:

1. Review your NCPA account and keep it updated
2. Handle the logistics weeks ahead of the program:
    a. Sign up for the student newsletter.
    b. Register for the officer training.
    c. Register for the Town Hall
3. Make travel arrangement (if it isn't virtual)
4. Collect all officer materials and bring them with you to the officer training:
    a. Completed Officer Manual.
    b. Evaluation and Prioritization Worksheet
    c. Any other relevant documents.
5. Have the chapter president send out an email two days prior to the training with last minute details and reminders.

MAXIMIZING THE EXPERIENCE

- To get the most out of NCPA, take advantage of these best practices:
    - Show up on time, energized and well dressed.
    - Register for townhalls, workshops, and newsletters
    - Take notes during each session capturing new ideas and lessons learned.
    - Build relationships with the Student Leadership Council and find out the key to their success.
    - Take notes on what chapters did to achieve the high honors and how you can emulate their best practices.

CONCLUSION AND SUPPORTING RESOURCES

SUMMARY

The officer transition process is a critical step to establishing the long-term stability and success of a chapter. A smooth officer transition builds on this foundation, improving the abilities of newly elected officers and decreasing the amount of time each officer spends “learning” their position. Through an effective transition, the incoming officers will be able to learn from the experience of the previous officers and offer continuity and continued growth of the organization.

RESOURCE: OUTGOING OFFICER WORKSHEET

INSTRUCTIONS

This document is to be completed PRIOR TO RETREAT MEETINGS. Please carefully consider and thoughtfully respond to the questions in the sections below. Feel free to type these answers in a separate document and print prior to the transition meeting.

REFLECTING ON MY TERM

1. What I liked most about my position…

2. What I liked least about my position…

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

4. What were my goals and priorities when I began this position? Where do they stand now?

5. The top three obstacles to performing my position responsibilities were…

6. The top three people or resources that supported me in my position were…

7. The top three things I wish I'd know before I took officer were…

8. What skills did I develop in this position that I will carry with me to other leadership positions and my career after college?

LOOKING FORWARD

1. If you had 60 more days in this position, on what would you focus?

2. What problems or areas of operation will require the most attention within the next 60 days? Next year?

3. What should be done immediately in the next 30 days?

INCOMING OFFICER WORKSHEET

INSTRUCTIONS

This document is to be completed PRIOR TO TRANISITON MEETINGS. Please think through and thoughtfully respond to the questions in the sections below. Feel free to type these answers on a separate document and print prior to the transition meeting.

UNDERSTANDING MY POSITION

1. What position-specific things do I want to know about (i.e., forms, reports, timelines, duties, etc.)?

2. Things I should do in the next month (include task and deadline):

3. People I should get to know (include name and deadline to contact):

4. Resources and services, I need to know about…

5. Other questions I want answered (include question and person to ask):

PREPARING FOR MY TERM

1. What do you perceive to be the chapter’s short-term objectives or goals?
2. What do you perceive to be the chapter’s long-term objectives or goals?
3. What do you consider to be the greatest responsibilities of your office?
4. What are your expectations of yourself in this position?
5. What expectations do you have for the rest of the executive board?
6. What expectations do you want your fellow leaders to hold you accountable to?
7. What problems or areas will require your greatest attention this year?
8. What action items do you want to complete in the next 30 days?

EVALUATIONS AND PRIORITIZATION

Introduction

Using the completed transition materials, each officer must evaluate their area of operation.

Instructions:

1. Show participants the completed Example - Evaluation and Prioritization Worksheet.
    a. Explain that this example is meant to show them the type of information that should go into this worksheet.
    b. Ensure they understand the work they need to complete a comprehensive review of their area of operation.

2. Each officer will spend 20 minutes to an hour completing the Evaluation and Prioritization Worksheet individually.
3. After completion, each officer should give a three-five-minute presentation on their completed worksheet with the group.
4. Allow the other officers to give feedback after they walk through their presentation focusing on each officer's top three priorities.
5. Allow officers to go back and adjust priorities based on the feedback they receive.

To help each officer set goals in these priority areas, we should dive into each priority individually. Robust and creative discussion will help each officer create a SWOT ANALYSIS that address the most pressing issues in their area of operation.

Instructions:

1. Each officer will read their first priority to the group.
2. Spend two minutes on each priority answering the question:
    a. What are tangible things we can do to improve this area of operation?
3. As the group gives feedback, have the officer owning this priority take detailed notes in a word document on their computer.
4. Repeat for the next two priorities.
5. Move to the next officer.

EVALUATION & PRIORITIZATION WORKSHEET

SWOT ANALYSIS

Using your transition materials, complete a SWOT analysis for your area of chapter operations.

AREAS OF OPERATION:

STRENGTHS:	
WEAKNESSES:	
OPPORTUNTIES:	
THREATS:	

TOP THREE PRIORITIES WORKSHEET

Using your SWOT analysis, determine your top three focus areas and explain why this should be a priority in the space to the right.

PRIORITY #1

PRIORITY #2

PRIORITY #3