



ORDER OF OMEGA

OFFICER TRANSITION

When your year as an officer ends and new officers are selected, how can you leave your position gracefully? How can you ensure the new officers are ready to provide your organization with strong leadership? A thorough leadership transition plan is the answer and has several benefits.

- Most obvious is the opportunity for transferring significant organizational knowledge.
- Minimize officer transition confusion. Often, precious time is lost while new officers try to figure out what is going on! This lag affects the whole membership and the group's ability to accomplish its goals and tasks.
- The process of transition can give outgoing leaders a sense of closure, by helping them let go, which is often a difficult for committed members.
- Leadership transition ensures the valuable contributions of experienced leaders will be utilized. They are often the most taken for granted group members.
- Minimizes the loss of momentum and accomplishments for the group.
- Finally, shared information gives the new leadership more knowledge and greater confidence in their ability to be effective in their roles.

A SMOOTHER TRANSITION CAN OCCUR IF YOU:

- Begin to identify emerging leaders in your organization early in the year.
- Encourage potential leaders through personal contact, skill development, delegation of responsibilities, shared benefits of leadership and clarification of job responsibilities.
- Update or prepare a transition notebook.
- Finish all correspondence that you can.
- When new officers have been elected, orient them as a group with all the outgoing officers. This allows new officers an opportunity to understand each other's roles and begin team building. It is also recommended that new and old officers transfer detailed information about organization business. Outgoing officers should openly share what they believe went well and that they would change if they had to do it over.
- After the meeting, make sure you are available to the new officer for any follow-up information.
- Transfer the necessary knowledge, information, resources and materials.

More specifically, what is important to transfer? Reflect on your first few weeks; what did you wish someone had told you?

PERSONAL EXPERTISE, KNOWLEDGE AND EXPERIENCE

- Effective leadership, qualities and skills
 - Share problems, ideas, procedures and recommendations
 - Write and share reports about traditions, ideas for completed projects, continuing projects and concerns, or ideas never carried out
 - Review personal and organizational files together
 - Acquaint new officers with physical environment, supplies and equipment
 - Introduce related personnel (advisor, contact, etc.)
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KNOWLEDGE OF THE ORGANIZATION'S STRUCTURE, GOALS AND ACCOMPLISHMENTS (through complete and organized files)

- Constitution and bylaws
- Job descriptions and role clarifications
- Organizational goals and objectives
- Status reports on current projects
- Evaluations of previous projects and programs
- Previous minutes and reports
- Resources
- Financial books and records
- Historical records, equipment, scrapbooks

PREPARING A TRANSITION NOTEBOOK

1. Introduction

- Table of contents
- Contact sheet for new leadership / membership

2. Letter from Advisor

- Role and responsibilities
- How to get in touch with him/her

3. Historical Documents

- Constitution
- Mission statement
- Goals and Objectives
- History of Organization
- Organizational chart
- Job descriptions for officers
- Committees
- Annual programs and activities
- Officer selection process and timeline
- Membership recruitment process and timeline

4. Evaluation

- End of the Year Report
- Suggestions for the upcoming year

5. Officer Position

- Responsibilities- the big picture
 - Procedures- the small details or the "how to's"
 - Detailed timeline
 - List of things that need to be done immediately (i.e. register organization, ect.)
 - Resources- contact names and numbers
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