

# **Student Leader Transition Planning Handbook**

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# Introduction

Every year student organizations transition leadership from an outgoing executive team to the incoming team. The transition of officers provides an amazing experience for you to develop highly valued, very important leadership skills and to apply leadership strengths to have a real-time impact through your college experience. However, as a group this poses many organizational challenges, such as the transitioning of pertinent information about the organization's operation, history, and future aspirations.

Along with the Strategic Planning Process (as outlined in the *ENGR Strategic Planning Handbook*), being intentional about the transitioning of incoming leaders into our student organizations is not only important, but powerful. Information can more effectively and efficiently transition from outgoing leaders to incoming leader, by setting aside a moment to organize transition material and schedule meetings and retreats.

By valuing the transition period and using the process at its full potential, student leaders can ensure that the valued aspects of their organization live on and detailed plans for future aspirations are created for easy implementation. The more succinct this process is planned and documented, the more time leaders have to focus on the opportunities and possibilities of being a student leader. Isn't that why we run for office in the first place?

*Use this handbook to help you structure, organize, and effectively plan for your organization's transition period.* Information is shared regarding the election process, meetings and retreats that will take place during the transition period, and what to cover during those meetings and retreats. Reflection activities are provided for both outgoing and incoming leaders, with the hope that new goals for the new year will be identified, generating excitement and motivation to hit the ground running with the organization's new leadership.

# Planning for Elections

Planning for new leadership in your student organization should start early. It is recommended that officer terms provide *at least* one month of overlap for new officers to learn from outgoing officers. When scheduling club elections remember to account for the end of the semester knowing that any mandatory participation requirements of members cannot occur during Dead Week and Finals Week.

The prioritization of elections and leadership transition is beneficial to your student organization. This creates time for current leadership to assess progress of yearly goals and to think strategically about the coming year with newly elected leadership.

## Suggestions for Elections

### **Begin planning for elections and transition *early*.**

It is suggested that conversations for elections begins at the beginning of the semester elections are held for reasons that are discussed below.

### **Identify potential general members to run for office.**

Reference the *ENGR Member Engagement Handbook* to help identify the four types of members who join student organizations. The four types are: 1) Want to be involved, 2) Want to meet people, 3) Want to develop leadership skills, 4) Believe in the cause/purpose of the organization. Each type of member represents a key area needed for your executive team to be successful. Connect each type of student organization member to the different skills needed to serve in the various leadership positions of your executive team.

Student organization leaders should begin developing relationships and learning about their general members as early as the first day of the new year for the organization. Organizations are only as successful as leaders are able to have relationships with each other and general members. Because you have already gotten to know your members, you can start to match their motivations for joining your club to the different types of members who join student organizations. Therefore, you can identify strong candidates to run for election and help them connect their motivations and aspirations to the skills needed to be successful in the position.

*Starting this process early gives current leadership time for mentoring, shadowing, and empowering potential candidates to build a platform with which to run for election. It also allows current leadership to fill the ballot with a number of high quality candidates for each position, further engaging general members for numerous reasons.*

## **Hold elections early.**

Early planning for elections has afforded you to fill your ballots with fantastic candidates, excited to consider their goals and aspirations for filling an executive position within the club. It has also allowed you to hold elections early, so as to jumpstart new leadership in their roles. The time afforded after holding early elections is useful for learning about the organization and creating goals for the next year.

When planning for elections, consider when general members will be most engaged during the semester to ensure voter turnout. Give thought to how you might run your elections. Will they be held during a general election where candidates can provide statements for their desire to run and plans for the organization and their position? Will you ask candidates to create videos to be shared with general members electronically? Will you vote by hand, use paper ballots, or use an online platform for voting? *The answers to these questions should be consulted by the organization's constitution, as well as the desire to engage the most number of general members. Leaders must have a strong understanding of their constitution and their general membership.*

Elections should be held early enough to give your organization at least a month after elections to, again, allow time for transition. The following provides consideration and direction for the transitioning process.

# Organizing the Transition Period

Once you have reflected on your time as a student organization leader, you can start planning for the transition period. Just as you considered how you might structure your elections, the same can be applied to how you organize and plan your transition period. The following is pause for consideration.

## Meetings and Retreats

To organize an effective and meaningful transition, consider scheduling meetings and retreats to review information pertinent for new leaders to know.

*Meetings:* **Have outgoing and incoming leaders meet by positions.** Ask each member to reflect on respect questions to share (outgoing leaders) and gather (incoming leaders) information and ask questions. Outgoing leaders should come prepared with a list of duties, expectations, and items that the incoming leader will need to be successful in their position. Additionally, introduce new leaders to resources, scheduling time to walk around campus introducing them to key offices and people to help orient them to specific responsibilities they will have.

*Retreats:* Plan a **Transition Retreat** during the month that you have scheduled for transitioning. Schedule this well in advance that outgoing and incoming leaders can tentatively plan. If possible require all members to attend and invite the club's adviser.

### *Proposed Retreat Schedule:*

- Introduce executive positions and their new leaders
- Reflect as a large group on the previous year, bringing already completed individual reflections of the goals and challenges the group faced
- Work with incoming leaders to create new goals and revisit strategic planning initiatives, identify areas in need of immediate attention upon return to the next term
- Recognize and celebrate the efforts of outgoing leadership

\*\*The proposed schedule could last an entire day, or if planned appropriately, could be reserved for half a day and the other half could be scheduled for individual meetings by leadership position.

## Checklist for Transitioning Information

The following checklist will help you organize the information pertinent to sharing with incoming leaders. Be sure to refer to the *ENGR Policy Handbook* and [Student Activities Center](#) website for complete information regarding university policies and procedures.

### General Items

- Introduce new leaders to the club adviser
- Exchange contact information of all club leaders and adviser
- Give access and instructions to any online platforms, such as:
  - Club email
  - Member listservs
  - Social media accounts
  - Website/blog
  - Online document storage (Dropbox, Google Drive)
  - National affiliation website login information/passwords
  - Any other communication tool your club may utilize
- Provide combinations to club locker
- Explain how to reserve meeting/event space on campus for the year
- If you are affiliated with a national organization, explain the relationship and any important information associated with the affiliation.
- Finish all club correspondence that you can and pass on any unfinished items to new leaders
- Complete all proper procedures as outlined by the [Student Activities Center](#)
  - Update new leaders
  - Complete new leader trainings
  - Reference the Student Activities Center for a list of all procedures needed to complete

### Finances

- Discuss the financial status of the organization
- Share how your organization is funded and possible funding opportunities (See *ENGR Policy Handbook*)
- Discuss how finances are handled

## Managing Officer Binders and Online Files

It is highly recommended to create a binder of information for each executive position within your student organization. Online files are by far easier to access among all students. *However, it is imperative that these files are saved on a sustainable online platform that will not cease to exist if the student leader that has ownership graduates.* If an online platform is most desirable but connected to a student leader's university account, it is imperative to move files accordingly so as not to lose your organization's history, creating a "reinvent the wheel" scenario. Hardcopy binders are great way to store online information and can be kept in the student organization's locker or office.

Information to consider organizing and sharing with specific executive positions, the executive team, and even general members.

(Adopted from Washington University's (St. Louis) [Get Involved](#) resource materials, and Montana State University's [Office of Activities and Engagement](#))

- Organizational Mission Statement and Goals
- Organizational Constitution and By-Laws
- Organizational Operations Manual
  - Pertinent policies and procedures
  - Routine operations for the group
- ENGR Policy Handbook
- Organizational Chart of Committees and Positions
- Committee Description
  - Specific responsibilities of committees
- Officer Position Description
  - Specific responsibilities of the position
  - Any changes that are needed in the job description
- Officer Time-Line
  - Current year calendar that indicates outgoing officer activities
  - Recommended dates by which tasks should be completed to fulfill responsibilities in timely manner
  - Election process and timeline
- Membership Recruitment and/or Application Process
- Event/Project Documentation
  - Event planning guide/checklist
  - Sample posters from past projects, social media advertisements
  - Event approval process instructions
  - Written evaluations from participants
  - Outgoing officer's feedback and recommendations
- Marketing
  - Logos (club logo, past events)
  - Print publications
  - Photos
  - Marketing/branding policy set by the club and whomever the club is affiliated with
- Budget



- Processes and procedures
  - Current budget
  - Accounting of how allocated funds were spent
- Documents
  - Forms
  - Agendas and meeting minutes
  - Officer and committee reports
  - Semester-end and year-end reports
  - Pertinent correspondence
- Resources
  - Key resource people helpful in fulfilling responsibilities and contact information (i.e. adviser, Student Activities Center)
  - List of general members and contact information
  - Name and contact information of outgoing officers
- Other Essentials
  - Keys, account transfers, mailbox information, logins and passwords, access codes, etc.
- Outgoing Officer To-Do List

# Planning for Transition: Outgoing Leadership

As you prepare to transition new members into their leadership roles, current leadership must organize necessary materials for students and reflect on the past year's experiences. *The following questions, checklists, and reflective activities can help you prepare to effectively orient newly elected leaders to their roles in the executive team.*

## Outgoing Officer Reflective Statements

(Adopted from Washington University's (St. Louis) Get Involved resource materials, <https://campuslife.wustl.edu>)

1. What I liked best about my position...
2. What I liked least about my position...
3. The most difficult decision I made was...
4. What I could have done to make the experience better was...
5. Obstacles I faced...
6. Resources which assisted me in my job were...
7. Things I wish I had known before I took office...
8. Our adviser helped me in my position by...
9. The most helpful people/offices have been...
10. I felt the club's objectives were...
11. My main responsibility was...
12. My three biggest accomplishments were...
13. One thing I tried to do and it did not work was... because...
14. One thing I wish I had done or tried, but did not was...
15. Three issues or problem areas that I believe need attention this year are...
16. I believe the first thing requiring attention this coming year is...
17. Immediately, at the beginning of the next semester, leaders should do...
18. Other important information leadership needs to know is...

## Outgoing Officers Major Accomplishments

Accomplishments	Barriers / Limitations	Resources	Solutions	Still to Be Done

# Planning for Transition: Incoming Leadership

As you prepare to transition new members into their leadership roles, current leadership must organize necessary materials for students and reflect on the past year's experiences. *The following questions, checklists, and reflective activities can help incoming leadership to become oriented to their new position and plan for the new year.*

## Incoming Officer Reflective Statements

(Adopted from Washington University's (St. Louis) Get Involved resource materials, <https://campuslife.wustl.edu>)

1. List three things (and why) that made you want to run for office...
2. List three new ideas that you would like to implement...
3. List three important foreseeable problems in the group and/or position...
4. List possible solutions to the above problems...
5. Things specific to my position I want to know about (Challenges, policies and procedures, duties, etc.)...
6. Things I should do before my term begins...
7. People (or positions) I should get to know...
8. Services or policies I need to know about...
9. Expectations I have for my adviser are...
10. Three groups I have for the group are...
11. I can best empower and work with the executive team by...
12. I can motivate and empower the general members by...
13. The legacy I would like to leave for the group is...
14. Other questions I want or need answered...

## Maintaining Continuity: Transition Questions New Officers

**Directions:** Many of these questions are geared toward former, or out-going officers. New officers can use these questions to brainstorm ideas or goals for the upcoming term of office.

1. What do you perceive to be your organization's objectives or goals?
  
2. What do you consider to be the responsibilities of your office?
  
3. What are your expectations of yourself in the office?
  
4. What expectations do you have of the executive council?
  
5. What expectations do you believe your members have of you?
  
6. What problems or areas will require attention within the next year?
  
7. What should be done immediately in the fall?
  
8. Who do you anticipate will be most helpful in getting things done? (People outside your organization such as advisors, professors, administrative staff, etc.)
  
9. Write down one specific problem you anticipate you will encounter during your term.

# INCOMING OFFICER GUIDE

## Your Role as a Student Leader

1. **Work on the morale of your group members.** Unless they feel good about their roles, your group members will not be as cooperative and productive as they could be.
2. **Expect any changes to be accepted gradually.** Sometimes we expect people to accept changes overnight that we have been thinking about for months. Remember that it is almost impossible to change people... they usually must change themselves.
3. **Be available to help those who want your help.** When we attempt to force our ideas of assistance when it hasn't been solicited, we risk building resistance among our group.
4. **Let your group members determine the group's purpose.** Unless group members have a say in what is to happen, their participation will be half-hearted at best.
5. **Emphasize the process for working through problems rather than the final result.** Your desired results may change as your group changes. An open channel of communication which involves all group members will help you incorporate these changes.
6. **Approach change through cooperative appraisal.** When change is based on evidence, it reduces the chances for a win-lose situation. The decision will be based on what is right, rather than who is right.
7. **Encourage brainstorming and creativity.** Provide feedback and support for new ideas and avoid penalizing for mistakes made for the sake of experimentation.
8. **Share decision regarding policies and procedures.** By emphasizing how to solve problems, and involving your members in these decisions, you will create deeper commitment in your members.
9. **Recognize criticism as the first step individuals take in assuming responsibility.** Use criticism as a chance to solicit suggestions for improvement.
10. **Share the glory.** You cannot expect enthusiastic participation if you take all the credit.
11. **Have faith and confidence in the ability of your group.** People tend to live up to our expectations, be they high or low.
12. **Be sure your group has a common purpose.** Structure meetings so that issues of common interest are discussed with the whole group, and individual concerns are addressed at other times.
13. **Trust the motives of all group members.** Attend to every suggestion as a sincere one which deserves a sincere response.
14. **Don't set yourself up as infallible.** Be honest and admit when you lack an answer. Don't be afraid to be human.
15. **Be specific.** Communicate exactly what you expect and think.
16. **Be socially sensitive.** Avoid being witty or funny at the expense of group members.
17. **Use the inquiry method.** Use questions to get information and define issues.
18. **Be impartial.** Play no favorites and give all group members equal chance to participate.
19. **Promote group cohesiveness.** Make all group members feel as if they belong.
20. **Manage conflict, don't ignore it.** Bring conflict into the open, and concentrate on issues, behaviors and facts rather than personalities.

*Adapted from: Student Organizations' Handbook - The Wichita State University (1992-1993)*

## Incoming Officers - "Goals, Dreams, & Priorities"

Things We Would Like  
To Accomplish

Barriers / Limitations

Resources

Unknown Questions

Why We Want This

Things We Would Like To Accomplish	Barriers / Limitations	Resources	Unknown Questions	Why We Want This

## References

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