

# OFFICER TRANSITION PLAN

Transition is key! A successful officer transition helps keep you from having to reinvent the wheel and allows the chapter to continue growth from year to year.

## TRANSITION TIPS

1. Pull up a blank calendar and work backward from the end of the semester to develop your timeline. Leave room for officers to meet one-on-one with their successors and develop a list of talking points to make the conversation as productive as possible.
2. Ensure transition documents are up to date. Many chapters utilize binders, but don't be afraid to branch out digitally! Include a personalized letter, sharing your goals for the semester, advice on how to succeed in the position and any tips you learned along the way.
3. Find a way to incorporate your advisors into the officer transition plan. Not only can they provide guidance for the chapter moving forward, but this also gives them the opportunity to get to know the new officers before the next semester begins.

## TRANSITION MEETING

1. Have a meeting with both executive boards, both incoming and outgoing, for the outgoing board to finish up business and allow the incoming board to experience how the meetings should be run.
  - a. When planning for the semester, make sure to leave ample time so that these meetings can occur. If scheduled during the same time as finals or graduation, attendance may be minimal.
  - b. Leaving time for this same process to happen at a chapter meeting is ideal. Have the incoming officers shadow at a chapter meeting, and then allow the new officers to run the next chapter meeting while the previous officers are still present.
2. Have each officer break into one-on-ones with their successor to go over personalized position business.
  - a. During this meeting, have the applicable officers set up their Officer Portal account. These accounts should be established before the end of the transition meeting.
3. Questions to ask during transition:
  - a. What do you wish you had been told before taking this position?
  - b. What were your biggest successes this year?
  - c. What are you most proud of accomplishing this semester?
  - d. What are ideas that you tried that didn't work?
  - e. What do you recommend the next officer try?
  - f. Did you run out of time and not get to work on a project?
  - g. What is the most rewarding aspect of this office?
  - h. What is a resource you wish you had while in this role?
  - i. What is the most valuable resource that you utilized?
  - j. Where do you see the position expanding in the future?
  - k. What is the best advice you have for your successor?
  - l. What is the hardest part of being in your position?
4. Sample Meeting Agenda:
  - a. Welcome and Introduction
    - i. 12:00 PM (10 minutes)
    - ii. Introduce new executive board.

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- b. Board Meeting
  - i. 12:10 PM (35 minutes)
  - ii. Conduct typical executive board meeting, wrap up business from the term, receive updates from officers.
- c. Team Building
  - i. 12:45 PM (15 minutes)
  - ii. Team building exercise with both executive boards.
- d. One-on-One Sessions
  - i. 1:00 PM (60 minutes)
  - ii. Have each position split off into one-on-one sessions where the current executive board member will walk through their binder/digital file of information, pass along access to any online documents they need, and walk through a day/term in the life of the position.
- e. Officer Portal Training
  - i. 2:00 PM (60 minutes)
  - ii. Get the new executive board switched over to the OP and have the old exec positions train the new board on position-specific Officer Portal duties.
    - 1. Establishing an Officer Portal account
      - a. After verifying that you are listed as an officer on record with the National Office you are ready to establish your account.
        - i. An already established officer will need to put you into office if you are not listed
        - ii. Open Officer Portal via the following link: <https://op.apo.org>
        - iii. You must use https: and not www
      - b. Click the link titled — “Click here to establish your officer portal account”
      - c. Select your chapter of initiation, click next
        - i. Enter your last name at time of initiation/petitioning
        - ii. Enter your first name at time of initiation/petitioning
        - iii. Enter your chapter roll number (can be found on the Officer Portal Members tab)
        - iv. Enter your pledge/petitioning year
      - d. Click next
      - e. A link will be sent to your email with instructions on setting up a username and password. Sometimes these messages get stuck in the spam box, so check here if you do not see the email in your inbox!
- f. Advisor Meeting
  - i. 3:00 PM (60 minutes)
  - ii. Advisors join the meeting to help set goals with old and new executive board present
- g. New E-Board Team Building
  - i. 4:00 PM (60 minutes)
  - ii. Previous executive board leaves and new executive board hosts a team-building exercise facilitated by the advisors
- h. New E-Board Planning Session
  - i. 5:00 PM (60 minutes)
  - ii. The new executive board creates a calendar plan for the next term

# OFFICER TRANSITION PLAN - CONT.

## THINGS TO INCLUDE IN TRANSITION BINDERS/ONLINE FOLDERS:

The ideal officer transition can be successful whether or not the previous officer is available to answer all questions.

Think through all documentation and information that might be necessary for an officer to succeed without the support of their predecessor.

1. Officer duties as stated in bylaws
2. Responsibilities not stated in bylaws
3. How-to documents for processes (submitting check requests, booking rooms, using Officer Portal, etc.)
4. Reports/meeting minutes
5. Contacts (community, campus, other chapters, other organizations, etc.)
6. What worked/what didn't
7. Timeline and/or calendar (could be a calendar of events that occurred in your time in office, with suggested times to start planning each event)
8. Advice/encouragement (could be in a letter format)
9. List of goals you had (check accomplished)
10. List of goals you all come up with together (during officer transition, allow time for goal-setting)
11. List of extra ideas that you had, that maybe you didn't have time to put into practice
12. Feedback from events