

Training and Transition

One of the most important functions of an advisor is to assist in the transition from one set of officers to the next. An advisor can play a stabilizing role as they have seen change, know what works and can help maintain continuity. Investing time in a good officer transition early on will set up your new officers for success. The key to a successful transition is making sure the new officers know their jobs *before* they take office. Expectations should be clearly defined. There are several ways to conduct officer transition, but here we will outline two.

The Team Effort

The team effort involves the outgoing officer board, the advisor, and the incoming officer board. This method involves a retreat or a series of meetings where outgoing officers work with incoming officers to

1. Past records/notebooks (transition binder) for their office and updating those together
2. Discuss what should take place regarding previous year projects that have been completed; upcoming/incomplete project, challenges and setbacks, and anything new officers need to know to do their jobs effectively

The advisor's role may be to:

- Facilitate discussion and be a sounding board for ideas
- Organize and provide the structure of a retreat
- Offer suggestions on various questions
- Refrain from telling new officers what they should do
- Be prepared to fill in the blanks. If an outgoing officer doesn't know how something was done or doesn't have any records to pass on to the incoming officer, you can help by providing the information they don't have.
- Provide historical background when needed, help keep goals specific, attainable and measurable
- Provide advice on policies and procedures

1x1 Advisor Training with Officers

While it is ideal to have the outgoing and the incoming officers meet to transition as a group, often this can be difficult to schedule which leaves the new officer training to the advisor. In this case, there should be a one-on-one meeting to educate each of the new officers. If it isn't possible to obtain the notes or transition binder from the outgoing officer, be prepared to make a new one.

A good transition binder should include items such as forms the officer may need, copies of previous meeting agendas, a hard copy of the most up to date constitution and bylaws, any outstanding paperwork, procedures and best practices for the position, and any other necessary information to fulfill the position.

Talk about what the officers hope to accomplish during their terms in office, assess the officer's role in the organization. Here are some questions you can ask yourself and the new officer

1. What are the expectations of each position? How can you see yourself fitting into the team?
2. What are the students' expectations of their position and what are their goals?