

TRANSITIONS AND ONBOARDING FOR STUDENT ORGANIZATIONS

One way to ensure the longevity and success of your student organization is to hold a successful officer transition and on-boarding process. Officer on-boarding is important to make sure the incoming officers feel prepared to take on their roles. Transitions and onboarding can most successfully exist in three steps:

1

Preparation (Outgoing Officers)

- Prepare for transition throughout your entire officer term. Take some time each month to write down what you worked on that month, contact information for people you worked with, and resources you used. This will allow you to remember tasks and responsibilities as you happen and will also keep transition information from getting lost year to year.
- Ensure you are keeping up with passwords and account information. By keeping track of this information, you can ensure your organization can transition social media, Google drive folders, and any other electronic materials successfully. Then, organize your materials.
- Consider where you are going to organize your materials (binder, Google drive folder, etc.) and streamline your organization to one method. Additionally, make sure to update your Garnet Gate account information (update officers, roster and primary contact) and transition the organization email and 25Live Account.

2

Transition (Outgoing & Incoming Officers)

- Schedule meeting times for the incoming and outgoing officer. It is helpful to have multiple, shorter meetings to allow the incoming officer to process information and ask questions.
- Outgoing officers, reflect on your experience with questions like what did you enjoy about the role? or what would you have done differently?
- Review the responsibilities of the job and prepare an annual timeline of events or action items for each month.
- Review any unfinished or ongoing projects and pass along any important information like passwords, technology, contact information and other resources.

3

Follow-Up (Incoming Officers)

- A successful organization is one where everyone understands each person's responsibilities and duties. Take the time to educate the group on each person's role.
- Team building can help build a strong foundation for an incoming officer team. Here are some [icebreakers and team builders](#) you can use.
- Review the state of the organization. By reviewing the state of the organization, the incoming officer team can create goals that correspond with organization strengths and also can assist in their areas of growth.
- Focus on team goal setting. Taking time to set goals as a team is an important foundational step for a new officer group. This allows your organization to create a common vision for the upcoming year.