



SGA

OFFICER TRANSITION GUIDE

Embry-Riddle Aeronautical University

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An effective officer transition:

- Maintains valuable continuity of the club's progress, goals, and growth.
- Helps ensure the successful transfer of important information between officers.
- Helps build upon the achievements of the outgoing Executive Cabinet.
- Re-enforces positive/productive communication between Executive Cabinet officers and between the Executive Cabinet and the club.
- Provides an opportunity for outgoing officers to reflect on their experience and for incoming officers to plan and establish new goals for the future.



THREE STEP TRANSITION

STEP ONE: OUTGOING OFFICERS

Outgoing Officer Checklist

- Organize all notebooks, binders, files, and electronic documents.
- Finish all necessary correspondence (e-mails, phone calls, etc.).
- Develop action plans and timelines for new officer transition, including but not limited to:
 - Necessary meetings attended and chaired by the officer.
 - Important tasks.
 - Introductions to key people/staff (relationship building).
- Complete the Outgoing Officer Worksheet.
- Complete the Maintaining Continuity Transition Questions.
- Complete the Outgoing Officer Major Accomplishments Worksheet.
- Attend the officer transition meeting.

ADDITIONAL CHECKLIST ITEMS:



OUTGOING OFFICER WORKSHEET

TO BE COMPLETED PRIOR TO TRANSITION MEETING. Think through and respond to the following questions regarding your role and responsibilities. This information will be helpful for your successor.

1. What I liked most 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 to performing my position responsibilities effectively were...
6. Things that helped me better handle the position were...
7. Things I wish I'd known before I took office were...



MAINTAINING CONTINUITY

Transition Questions for Outgoing Officers

TO BE COMPLETED PRIOR TO TRANSITION MEETING. Please think through and respond to the following questions regarding your responsibilities. This information will be helpful for your successor.

1. What do you perceive to be the club's objectives or goals (short-term and long-term)?
2. What do you consider to be the greatest responsibilities of your Executive Cabinet position?
3. In regards to your Executive Cabinet position, what do you wish you had done, but did not?
4. In regards to your Executive Cabinet position, what did you try that did not work? Why not?
5. What problems or focus areas will require attention within the next year? Why?
6. Who was the most helpful in getting things done? (Who was a good resource for you?)
7. What should be done immediately (right now) and/or first thing next semester?



OUTGOING OFFICER MAJOR ACCOMPLISHMENTS

TO BE COMPLETED PRIOR TO TRANSITION MEETING

Accomplishment	Barriers/ Limitations	Resources Used	Solutions to Problems	Still to be Done



PREPARING FOR OFFICER TRANSITIONS

INCOMING/OUTGOING PRESIDENT AND ADVISOR CHECKLIST

Things to do before the officer transition meeting:

- Pick a date and time for your officer transition meeting.
- Reserve a room on campus that will accommodate your meeting. You should consider the set-up and layout of the room, and ensure it has any audio/AV you may need, including a projector and/or a white board.
 - PRO-TIP: The officer transition meeting should be in a space that is free from distractions.
- Notify the individuals that need to be in attendance at least two weeks in advance. Make sure you provide them with context and a meeting agenda, and that **you also let them know of any “pre-work” they need to do**. These individuals could include:
 - Outgoing Officers
 - Incoming Officers
 - Lead Advisor
 - Other Club Advisors
- Consider any materials you may need for the transition meeting and purchase or collect them. This could include writing utensils, flip chart paper and markers, printed worksheets, post-it notes, officer binders or flash drives with notes, the club budget for the upcoming year, etc.
- (Optional) Order food for everyone. This includes advisors, incoming and outgoing officers. Remember to ask if anyone has dietary restrictions! Consider how the food will get to the retreat. Will another officer pick-up and deliver the food? Will you order delivery? Will all attendees eat together in a cafeteria? Are you providing drinks, or should people bring their own beverages/snacks?

ADDITIONAL TO-DO ITEMS:



STEP TWO: INCOMING OFFICERS

Incoming Officer Training

- Review the club's Constitution and by-laws—especially those that apply to your Cabinet position.
- Complete the Incoming Officer Worksheet.
- Complete the Maintaining Continuity Transition Questions.
- Read the completed Outgoing Officer Major Accomplishments Worksheet.
- Attend the officer transition meeting.

ADDITIONAL CHECKLIST ITEMS:



INCOMING OFFICER WORKSHEET

TO BE COMPLETED PRIOR TO TRANSITION MEETING. Please think through and respond to the following questions. This information will be helpful as you begin planning for the next year.

1. What position-specific things do I want to know about (i.e. forms, reports, timelines, duties, etc.)?
2. Things I should do in the next month...
3. People I should get to know...
4. Resources and services I need to know about or have already looked at/researched...
5. Things I need to know about working with my Club Advisors
6. Other questions I want answered...



MAINTAINING CONTINUITY

Transition Questions for Incoming Officers

TO BE COMPLETED PRIOR TO TRANSITION MEETING. Please think through and respond to the following questions. This information will be helpful as you begin planning

for the next year.

1. What do you perceive to be the club's objectives or goals (short-term and long-term)?
2. What do you consider to be the greatest responsibilities of your office?
3. What are your expectations of yourself in this position?
4. What expectations do you have for the rest of the Executive Cabinet?
5. What expectations do you believe others have of you?
6. What problems or areas will require your greatest attention this year?
7. What should be done immediately next semester?



STEP THREE: ONE-ON-ONE MEETING GUIDE FOR OUTGOING AND INCOMING OFFICERS

Meeting to-do items

- Transition officer materials to the incoming officer.
- Review all responsibilities of the Cabinet position.
- Review a timeline for completing the duties of the Cabinet position.
- Review all the major accomplishments over the past year.
- Review all the unfinished projects still to be completed.
- Consider and discuss opportunities for improvement within the position.
- Share all important resources and contacts (including their contact information).
- Discuss “mistakes” or “missed opportunities” the outgoing officer made that could have been avoided.
- Ensure the outgoing officer shares his contact information (if questions arise later).
- Brainstorm other relevant questions:
 - What specific accomplishments were realized this year and why were they successful?
 - What problems or disappointments did you encounter this year and how could they have been avoided or corrected?
 - What materials or resources did you find most helpful (e.g. contacts, advisors, websites, campus partners, etc.)
 - How can the timeline for this position be made more efficient and effective?



A BRIEF GUIDE TO SMART GOAL SETTING

A SMART goal is a goal that is Specific, Measurable, Attainable, Relevant, and Timely. In other words, a goal that is very clear and easily understood.

SPECIFIC

The goal must clearly state what is to be achieved, by whom, where, and by when.

MEASURABLE

Measurability applies to both the end result and the milestones along the way to attaining a goal. It answers the question of quantity—how much, how often, how many? The milestones are signs along the way that will tell you that you are on the right track to achieving your goal.

- For instance, your ultimate goal may be to fundraise \$6,000 in a year, but the milestones may be to make \$500 every month, which will add up to \$6,000 in a year. By focusing on \$500 every month you will ultimately reach your goal of \$6,000. This makes the goal more attainable because it is easier to think of ways to make \$500 every month than \$6,000 all at once.

It has been said that **what cannot be measured cannot be managed**. This is often true when it comes to goals. Sometimes it is difficult to measure a goal, but at such times there is usually an indirect measure that can be applied.

ATTAINABLE

You should ensure that the goals you set are achievable. **You must believe that you can accomplish what you are setting out to do**. If you set goals that are unbelievable, it is very unlikely you will achieve them. This is equally important when setting goals for the club. If the members for whom the goals are being set do not believe they are attainable, it is unlikely they will work wholeheartedly towards achieving them.

REALISTIC

Your goals must be relevant to what you want to achieve in the short-term and the long-term at both the club and the individual officer position levels. Understanding your organizational or personal vision, mission, and purpose is critical in this respect.

- Sometimes we can be tempted to do something simply because it is easy and sounds great, only to discover later on that it has no long-term importance to what you want to achieve as an individual or an organization. Ensure things that are most important are in line with your long-term vision and mission: **of your club**

TIMELY

This sometimes overlaps with the goal being specific, but it aims to ensure that you put a time frame to your goals. It's been said, "a goal is a dream with a time frame to it". Simply deciding by when you want to achieve something can be a good motivator. It can prevent you from procrastinating because you know what you are working towards has a deadline. Don't forget to add smaller goals or milestones along the way to achieving your larger goal so you can track your progress along the way.



SMART Goal Worksheet

Today's Date: _____ Target Date: _____ Start Date: _____ Date Achieved: _____

Goal: _____

Verify that your goal is SMART

Specific: *What exactly will you accomplish?*

Measurable: *How will you know when you have reached this goal?*

Achievable: *Is achieving this goal realistic with effort and commitment? Do you have the resources to achieve this goal? If not, how will you get them?*

Relevant: *Why is this goal significant to your position? To the club?*

Timely: *By when will you achieve this goal?*

This goal is important because:



The benefits of achieving this goal will be:

Take Action:

Potential Obstacles Potential Solutions _____

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Who are the people you will ask to help you?

Specific Action Steps: *What steps need to be taken to get you to your goal? What are your milestones?*

Step/Milestone Expected Completion Date Completed On

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



Short- and Long-Term Goals Worksheet

Long Term Goal #1: _____

Obstacles: Resources: Benefits:

Short Term Goals/Milestones:

1. _____
2. _____
3. _____

Long Term Goal #2: _____

Obstacles: Resources: Benefits:

Short Term Goals/Milestones:

1. _____
2. _____
3. _____

Long Term Goal #3: _____

Obstacles: Resources: Benefits:

Short Term Goals/Milestones:

1. _____
2. _____
3. _____



SWOT ANALYSIS

What is a SWOT Analysis?

A SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) is a type of planning tool useful in business and organizational settings that allows for stakeholders to take account of internal and external factors that affect (or will likely affect) the organization. By analyzing these factors, we can conduct a 360-degree evaluation and plan for success.

Strengths and Weaknesses refer to those *internal* attributes (within our immediate control) that help or hurt the club. Opportunities and Threats refer to those *external* (out of our immediate control) things that we can anticipate and plan for encountering.

To begin your club's SWOT Analysis, consider the following as a group and fill out the table on the next page:

STRENGTHS

DEFINE AREAS YOU EXCEL IN.

- What does your club do well?
- What kinds of members do you have, and what are their strengths?
- Does your club have a clear strategic vision?
- Does your club's culture produce a positive environment?

WEAKNESSES

EVALUATE YOUR LIABILITIES.

- What could be improved upon within your club? (GPA, recruitment, finances, etc.)
- Where could members' skills and talents be better utilized or built upon?
- What concerns you most about the club?
- Are there "liabilities" *in* the club (people, processes, etc.) that you need to address?

OPPORTUNITIES

ANALYZE YOUR POTENTIAL NEW MEMBERS, THE STUDENT BODY, YOUR CAMPUS

- What favorable circumstances are your club facing?
- What are the interesting trends? Is your club positioned to take on those trends?
- Is your club recruiting new and different types of students? Could you be?

THREATS

CHECK OUT WHAT YOUR COMPETITORS ARE DOING AND ASSESS OTHER POTENTIAL CHALLENGES.

- What obstacles does your club face on campus?
- What is your "competition" doing?
- What policies are being implemented that may affect your club?



Club SWOT Analysis

<p>Strengths (INTERNAL)</p> <p>What do you do well? What unique resources can you draw on? What do others see as your club's strengths?</p>	<p>Weaknesses (INTERNAL)</p> <p>What could you improve within the club? Where do you have fewer resources than others? What are others likely to see as weaknesses?</p>
<p>Opportunities (EXTERNAL)</p> <p>What opportunities are open to your club? What trends could you take advantage of? How can you turn your strengths into opportunities?</p>	<p>Threats (EXTERNAL)</p> <p>What threats could harm your club? What is your "competition" doing? What threats do your weaknesses expose you to?</p>
<p>Conclusions:</p>	



Other Resources

- SGA
 - Prescotterausga.com
 - Instagram: erau_sgapr. Twitter: ErauSGAprescott
 - Organization rep email: prsgaorg@erau.edu
 - SGA Club funding can be found on the website
- Department of student services
 - Creating a new org link
<http://cglink.me/d4315bf46448876215dd8e82c6f6b665cc9788f2185ef108dc3438abf453de31>
 - Example Constitution and By-laws
<http://cglink.me/d9f94baa52cae94cb80bf64338ce1d709f481f4ae2516c68ea2e2e5134ab4ada>
 - Director of Student Engagement: Emily Bauer bauere1@erau.edu

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Adapted from

- UC Berkeley STUDENT ORGANIZATION OFFICER TRANSITION GUIDE
- CSU HD Officer Transition Guide
- Sig Tau V1 2020-2021 Officer Transition Manual



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