

Executive Board Transition Outgoing Officer Report

Purpose: To assist in executive board transition by focusing on the accomplishments and to provide a critique of your year in office. This report should serve your successor as a supplementary resource in planning for their term.

Position: _____

Name: _____

Date: _____

1. List other Offices/ers with whom you worked and the projects involved.
2. List specific successes realized during your term in office and the reasons for their success.
3. List any problems or disappointments you encountered as part of your office and suggest ways of avoiding or correcting them.
4. List additional materials and sources of information you found most helpful. Include the phone numbers for advisors, useful EMU departments and faculty/staff, community resources, and helpful alums.
5. Explain a timetable of activities for your position. Offer suggestions for increasing efficiency and effectiveness.
6. List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

Outgoing Executive Board Report

1. How have we developed new members?
2. What positive changes did we implement as an executive board?
3. What were some of the successful programs that we worked on as a board?
4. What were our three greatest accomplishments as a board?
5. What was our greatest challenge as an executive board? How did we do in meeting this challenge?
6. How did we work together as a group? What could we have done to be more effective?
7. What are three things that we would have liked to achieve as an executive board?
8. What value did we add to the organization?

Officer Binder Checklist

- ___ Constitution/Bylaws
- ___ Position Duties/Expectations
- ___ All current forms pertinent to the position
- ___ Contact list of relevant and useful names and phone numbers for the position
- ___ Timeline for the Position (week-by-week of what needs to be done)
- ___ Budget (and recommendations for any increases/decreases)
- ___ Project summaries for events coordinated by the officer
- ___ Recommendations for the upcoming semester/year
- ___ Calendar for the past year
- ___ Job descriptions for the Committee that supports your position
- ___ Officer Transitions Outgoing Officer Report
- ___ Other _____
- ___ Other _____

Officer Transitions One-on-One Meeting Checklist

Part 1: Officer Notebook and Responsibilities

- ___ Give your cleaned out, organized notebook to the new officer and explain its contents.
- ___ Explain the duties and responsibilities of the position.
- ___ Explain the duties that go along with the position that are not in the officer description.
- ___ Review the past year's calendar and explain the programs and events that took place.
- ___ Show the officer the organization's Constitution/Bylaws. Recommend that they read them later.
- ___ Review the budget for the position.
- ___ Explain the forms/files that have been started over the past year.
- ___ Review the list of contacts pertinent to the position (and how to best use them).
- ___ Check the supplies and materials that are necessary for this position.
- ___ Together, brainstorm some ideas for the position.
- ___ Discuss the timeline and deadlines that are associated with this role. Discuss the importance of meeting deadlines for forms and other paperwork.

Part 2: Goals and Follow-Up

Once you've covered the Officer Notebook and related materials, cover the following items. For this part, review the goals that you as an outgoing executive board member had for the previous semester/year.

- ___ Explain the status of these goals.
- ___ Explain which goals are completed.
- ___ Explain which goals need follow-up.
- ___ Now, help the incoming officer think of some goals that they might set for the upcoming semester/year.
- ___ Set up a time to meet again during the incoming board member's first month in office

Follow Up Meeting: Date _____ Time _____ Location _____

- ___ Answer any questions the new officer has for you.

Incoming Executive Board Member Worksheet

1. That is the purpose of my position?

2. What are the responsibilities of my position?

3. What ideas/goals do I have for improving this office?

4. What new/old programs do I plan to use during my term?

5. How can I use the membership effectively this term/year?

6. What do I want to accomplish in the short term (semester -5 goals)? How am I going to accomplish these?

7. What do I want to accomplish by the end of my term (5 goals)? How am I going to accomplish these?

Incoming Executive Board Worksheet

Part 1: Discussion Questions

1. Is there group consensus as to where we are headed?
2. How does every member participate in the decisionmaking process?
3. Does every member do their share in organizational operations?
4. Do the officers know what the member's really want?
5. Do we have a mission statement? Why do we exist?
6. What things, do we, as a group, do well?
7. How do we work together? How could we work together better?
8. What is the vision for the organization over the upcoming year?
9. What are some areas the organizations should work on this semester? This year?
10. How are the general members utilized? How can we better utilize their ideas?
11. What are the expectations, that we, as an executive board, are going to hold ourselves to during our terms\?
12. What do you want out of your experience as an executive board member?
13. What can you contribute to this group?
14. How can we use our resources (e.g. campus, alumni, community) better?

Part 2: Accomplishments and Goals

What do we want to accomplish by the end of our term as an executive board?

WHAT WE WANT TO ACCOMPLISH

PRIORITIZED LIST

1.

1.

2.

2.

3.

3.

4.

4.

5.

5.

6.

6.

7.

7.

What five goals do we want to accomplish in the short-term (one semester) as an executive board?

1.

2.

3.

4.

5.

What are some strategies we can use to help accomplish these goals?

What resources can we use to help achieve our goals?