

# LOVING THE CREW: OFFICER TRANSITION

## C.R.E.W Officer Transition Outline

All things come to an end, and your organization will face the transitioning period when officers leave their current positions. However, that process doesn't have to be confusing or tedious at all! Having a transition plan in place will help your incoming officers pick up right where the organization left off.

Remember the word, C.R.E.W when developing your transition plan:

- **C**ontacts, **R**ecords, **E**vents, **W**isdom

Transition plans help define leadership roles and empowers those who step into those roles. Each top officer should keep a binder or notebook with the following information. Check items off the list after they have been added.

### Contacts

- Outgoing officer's contact information
- Campus Connections (CSI, Advisor, etc)
- Vendors
- Donors and Sponsors

### Records and other documentation

- Mission Statement and Purpose
- Constitution/Bylaws, University of Houston Student Handbook
- Position description and responsibilities
- Calendars and Timelines
- Organization Registration is in April!
- Marketing designs
- Meeting agendas
- Meeting minutes
- Letter templates
- Organization email account username/password
- Budgets and Finances
  - Receipts and invoices
  - Tax Identification Number (EIN)

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## Events, activities and other key initiatives

- Descriptions of staple and future events
- Ideas for future programs

## Wisdom and encouragement for new officers

- Advice
- FAQs
- Legacy and Goals

## What are the major components of officer transitioning?

- Selecting new officers
- Identifying key information to be shared
- The transmission of key information to new officer
- New officer assumes leadership role within the organization

## Officer Transitions and the Advisor: Things to Consider

- Will the current advisor serve next year?
- How will you help build the relationship between the new officers and the advisor?

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## Wisdom, Advice, and FAQs

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Help! More than likely, a new officer will have some of the same questions, issues and opportunities that the previous officer encountered.

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...
5. Obstacles I encountered in my position were...
6. Things I wish I'd known before I took office were...
7. One University policy that I really had trouble with was...

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What goals and objectives will you encourage the new officers to achieve? What are some past organizational successes will inspire the new officers?

Accomplishments	Barriers/ Limitations	Tools and Resources	Solutions	Goals