

# INTER-CLUB COUNCIL CLUB TRANSITION GUIDE

This guide is designed to help outgoing and incoming student club officers  
and club advisors with their officer and annual transition.

Updated March 2024

Chaffey  College

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## Introduction

If you plan ahead for events and meetings to ensure the success of your club, why wouldn't you do the same for the club's future leadership? Being prepared and intentional with your club's officer or leadership transition is the key to your club's survival from officer-to-officer and year-to-year. A successful leadership transition process should be carefully planned out.

It is the responsibility of the outgoing and incoming officers to ensure this transition occurs long before the outgoing officers depart. Successful and strong clubs are often created by a core group of dedicated members and with an effective transition, all the work and dedication will not be lost and your club will continue to thrive on campus.

This guide was created to assist student clubs and their officers with their leadership transitions and it should be used when there is a change in officers and from one academic year to the next.

## Purpose

### *An Effective Officer Transition:*

- Maintains seamless continuity of the club's progress, goals, and growth
- Helps build upon the achievements of the outgoing clubs' officers
- Reinforces productive communication between officers, and between the officers and the members
- Provides an opportunity for incoming officers to plan for the future and establish new goals

### *Benefits of a Successful Leadership Transition*

- Allows a transfer of significant organizational knowledge
- Minimizes the confusion and procrastination
- Gives outgoing leaders a sense of closure
- Gives incoming leaders a sense of support and guidance
- Utilizes the valuable contributions of experienced leaders
- Increases the knowledge and confidence of the new leadership
- Minimizes the loss of momentum and accomplishment for the group

## Organize/Create Club Transition Binder

Every club should have some form of a Club Transition Binder, this could be a hardcopy binder, a digital version, or an online version. It doesn't matter what format the Club Transition Binder is, as long as it works for your club. The Club Transition Binder is a vital tool for a successful transition within your club. It should cover all aspects of officer responsibilities and how those tasks fit into the organization's big picture, it should hold the club's "historical" documents in the binder (e.g., meeting minutes, event proposals, charter, member info).

It's important to think of the Club Transition Binder as a "working" or "living" document rather than something that should only be completed at the end of the year. Meaning club officers should be updating and editing the contents of the Club Transition Binder as needed so that it is always up-to-date.

There isn't currently an official ICC template for the Club Transition Binder, but here are some sections that your club officers should consider adding:

### Club Transition Binder Sections

- Club Introduction
- Club Charter & Bylaws
  - Officer Position Job Descriptions
  - Membership Contacts/Information
  - National Affiliation Info (*if applicable*)
- Important Contacts
  - Previous Officers – email and/or phone numbers
  - Key Administrative Contacts – offices, departments, people, etc.
  - Community/Other Contacts – email and/or phone numbers
- Login Information and Passwords – email, social media, websites, etc.
- Budget Information
  - Current Balance Sheet – from previous year and template for upcoming year
  - Fundraising Efforts
- Historical Documents & Communication
  - Agendas & Minutes
  - Club Events
    - Calendar of Events
    - Event Proposals - All supporting documents contracts, W9s, etc.
    - Copies of Marketing & Outreach Materials – flyers, posters, etc.
  - National Conferences, Assemblies and Regional Activities (*if applicable*)
  - Financial Documents – balance sheets, funding requests/deposits, receipts/invoices, etc.
  - Club Correspondence – any emails/mailings to or from vendors, sponsors, club officers or advisor, etc.
  - Publications and Newsletters
- Transition Information
  - Officer Reports
  - Transition Meeting/Retreat Info
- Miscellaneous Information

## Outgoing Executive Board (E-Board) Worksheet

Have all the club officers and perhaps the club advisor reviews the topics below and respond (as a group) to the following questions regarding your club and your responsibilities as the club leaders.

### Goals

What goals did we hope to accomplish?

How well did we do on each goal?

Which goals should be continued?

Which goals should be altered or dropped?

### Events

What events did we sponsor?

How effective was each event?

Did we do any community service events? If so, what were they?

Which events should be continued and which should be dropped?

### Membership

Do we currently have just enough, too few, or too many members (in light of the group's goals)?

How effective were our membership recruitment efforts, if any?

Are the members actively involved in the operation of the club (including decision making, planning, implementing, and evaluating)?

Are members enthusiastic about the activities and motivated to work towards the group goals?

Were there adequate opportunities for members to get involved?

### Officers and Club Structure

Do officers understand their responsibilities and roles within the club structure?

Did the officers operate as a team or could cooperation between officers be improved?

Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?

How would the general membership evaluate the effectiveness of the officers?

How would the officers evaluate the effectiveness of the officers? What could be improved?

### Club Operations

Was the budget managed properly?

Were meetings run effectively?

Was the frequency of meetings appropriate?

Do we have a committee structure within our club? If so, is it working? If not, is it needed?

Do we experience scheduling conflicts with other groups or activities?

### Additional Info

What are the major strengths of our organization?

What are the major weaknesses?

What is the best advice we, as outgoing e-board, can give to the new officers?

### Next Steps

Incoming Officer To-Do-List (Make this list together so the outgoing officer can help with direction.)

Which items need their attention now?

*“Your life does not get better by chance. It gets better by change.” ~ J. Rohn*

## Outgoing Officer's To-Do-List

- |   |  |
|---|--|
| <input type="checkbox"/> Organize/Create Club Transition Binder       | <input type="checkbox"/> Complete Outgoing Officer Worksheets            |
| <input type="checkbox"/> Complete Unfinished Officer Responsibilities | <input type="checkbox"/> Develop Plan & Time-Line for Officer Transition |

## Outgoing Officers Questions

TO BE COMPLETED PRIOR TO TRANSITION MEETINGS. Many of these questions are geared toward former, or out-going officers. They should be considered carefully and communicated to the newly elected officer. New officers can use these questions to brainstorm ideas or goals for the upcoming term of office.

1. The most valuable thing(s) I learned about doing my position effectively is/are...
2. Obstacles to performing my position responsibilities effectively were...
3. Something(s) I tried that did not work are... They did it not work because....
4. Things that helped me better handle the responsibilities of the position were...
5. What do you consider to be the greatest responsibilities of your office?
6. Things I wish I'd known before I took office were...
7. When I needed help, these were my resources...
8. What is the best advice you can give your successor?



Outgoing Officers Major Accomplishments

Accomplishments	Barriers / Limitations	Resources	Solutions	Still to Be Done

## Incoming Officer's To-Do-List

- Complete Incoming Officer Worksheets
- Attend Officer Transition Meeting
- Review Club Transition Binder
- Review Goal Setting Guide

## Your Role as a Student Leader

1. **Work on the morale of your group members.** Unless they feel good about their roles, your group members will not be as cooperative and productive as they could be.
2. **Expect any changes to be accepted gradually.** Sometimes we expect people to accept changes overnight that we have been thinking about for months. Remember that it is almost impossible to change people... they usually must change themselves.
3. **Be available to help those who want your help.** When we attempt to force our ideas of assistance when it hasn't been solicited, we risk building resistance among our group.
4. **Let your group members determine the group's purpose.** Unless group members have a say in what is to happen, their participation will be half-hearted at best.
5. **Emphasize the process for working through problems rather than the final result.** Your desired results may change as your group changes. An open channel of communication which involves all group members will help you incorporate these changes.
6. **Approach change through cooperative appraisal.** When change is based on evidence, it reduces the chances for a win-lose situation. The decision will be based on what is right, rather than who is right.
7. **Encourage brainstorming and creativity.** Provide feedback and support for new ideas and avoid penalizing for mistakes made for the sake of experimentation.
8. **Share decision regarding policies and procedures.** By emphasizing how to solve problems, and involving your members in these decisions, you will create deeper commitment in your members.
9. **Recognize criticism as the first step individuals take in assuming responsibility.** Use criticism as a chance to solicit suggestions for improvement.
10. **Share the glory.** You cannot expect enthusiastic participation if you take all the credit.
11. **Have faith and confidence in the ability of your group.** People tend to live up to our expectations, be they high or low.
12. **Be sure your group has a common purpose.** Structure meetings so that issues of common interest are discussed with the whole group, and individual concerns are addressed at other times.
13. **Trust the motives of all group members.** Attend to every suggestion as a sincere one which deserves a sincere response.
14. **Don't set yourself up as infallible.** Be honest and admit when you lack an answer. Don't be afraid to be human.
15. **Be specific.** Communicate exactly what you expect and think.
16. **Be socially sensitive.** Avoid being witty or funny at the expense of group members.
17. **Use the inquiry method.** Use questions to get information and define issues.
18. **Be impartial.** Play no favorites and give all group members equal chance to participate.
19. **Promote group cohesiveness.** Make all group members feel as if they belong.
20. **Manage conflict, don't ignore it.** Bring conflict into the open, and concentrate on issues, behaviors and facts rather than personalities.

*Adapted from: Student Organizations' Handbook - The Wichita State University (1992-1993)*

## Incoming Officers Questions

TO BE COMPLETED PRIOR TO TRANSITION MEETINGS. Please think through and respond to the following questions:

1. What made you want to run for this office? Why? List three reasons:
2. Can you foresee any problems during your term of leadership? What solutions can you suggest?
3. Who would you go to if you had concerns about members of the e-board? An event?
4. What goals or events from last year would you like to continue? How can you improve them?
5. What specific kinds of materials do you think you need to have transferred to you?
6. What specific things to my officer position do I want to know about (forms, duties, etc...)?
7. What things do I want to know about working with my Advisor?
8. What are your expectations for yourself in this position?

Incoming Executive Board (E-Board) Worksheet

Things We Would Like to Accomplish	Barriers / Limitations	Resources	Unknown Questions	Why We Want This

## Transition Meeting Outline

Before the newly-elected officers of your organization officially assume their responsibilities, it is wise for the old and new officers to get together for a “transition meeting.” Through such a transition meeting, the new officers will be able to learn from the experience of the outgoing officers and offer continuity and continued growth for the organization. A casual, open atmosphere should be encouraged so that the organization can benefit from an honest evaluation of the accomplishments and problems of the previous year.

A suggested length should be about 1 ½ to 2 ½ hours; being thorough will ensure greatest continuity. The outcomes of holding the transition meeting should be:

- Increase and foster open and honest communication
- Builds positive social relationships
- Develop trust and mutual support
- Builds respect and an appreciation of differences
- Builds and promotes club pride

The following outline, along with your worksheets, can help you make your transition meeting go as smoothly as possible.

- **Welcome and Introductions**
  - Help participants get acquainted and explain the purpose of the meeting. You may even want to do some team builder/ice-breaker activities too.
- **The Year in Review**
  - **Goals:** Review the group’s goals for the previous year.
    - What did we hope to accomplish?
    - How well did we do on each goal?
    - Which goals should be carried on this year?
    - Which goals need to be changed?
    - Which goals are no longer feasible?
  - **Events:** Evaluate what your group did.
    - How effective were the programs / activities we sponsored?
    - Did we have a good balance in our schedule of programs and activities?
    - Were our programs and activities consistent with our goals?
    - Which activities and programs do we want to repeat?
  - **Membership:** Evaluate number of members and their commitment
    - Do we have too many, too few, or just the right amount of members?
    - Were our recruitment efforts successful?
    - Are our members as actively involved as we want them to be?
    - Were the chances for members to get involved in a meaningful way?
  - **Officers and Club Structure:** Evaluate officers and structure.
    - Are officer roles and responsibilities clearly described?
    - Did officers work as a team, or is there more teamwork needed?
    - Is the time and effort required in each office comparable?
    - Is there two-way communication between officers and members?
    - How do the members feel about the officers?
  - **Club Operations:** Evaluate finances, communication, etc.
    - Were the finances adequate for our group, and managed properly?

- Were meetings run effectively? Was their frequency adequate?
    - Did the committee structure work?
    - Did we have scheduling conflicts with other groups or activities?
  - **Advisor Involvement:** Evaluate both quality and quantity of involvement
    - Did our advisor provide the support we needed?
    - Did we give our advisors and other faculty a chance to get involved?
    - How could we improve faculty involvement?
  - **Public Image:** Evaluate how other groups perceive you.
    - How do we see ourselves? Is this how “outsiders” see us?
    - How can we enhance our image?
- **Outgoing E-Board Legacy to the Incoming E-Board**
  - What are the current strengths and weaknesses of the group?
  - What is the best advice you can give your successor?
  - What were the major challenges and accomplishments in your term?
- **Officer Transition** Have the new and outgoing officers meet individually to discuss:
  - Responsibilities of the position, with a job description if possible.
  - A timetable for completion of annual duties.
  - Unfinished projects.
  - Important contacts and resource persons.
  - Mistakes that could have been avoided.
  - Advice for the new officer.
  - Any questions the new officer may have.
  - Where the outgoing officer can be reached with future questions.
- **Wrap-Up**
  - Make the transition official in a semi-official “Passing the torch” ceremony and wish everyone luck! Provide an opportunity for informal socializing afterwards.

*Adapted from: The Wichita State University Student Organizations' Handbook (1992-1993)*

When shifts and  
transitions in life shake  
you to the core, see that  
as a sign of the greatness  
that's about to occur.



### One-on-One Officer Meeting Handout

This handout will assist in officer transition by focusing upon past accomplishments and providing a critique of the year in office. This should serve as a supplementary resource in planning for the new officer's term and be added into the Transition Binder.

Office: \_\_\_\_\_ Name: \_\_\_\_\_

1. List other officers/offices with whom you worked with and the events/projects involved.
2. List specific accomplishments realized during your term in office and the reasons for their success.
3. List any problems or disappointments you encountered as a part of your office and suggest ways of avoiding or correcting them.
4. List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, college officers, community resources, etc.
5. Comment on the timetable applicable to your office. Give 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.

### Questions to ask outgoing officers

What things I should do over the summer?

Which people (specific positions) that I should get to know?

Services that I need to know about?

Other questions I want answered?

*Adapted from: NIC Retreat Workbook (verbatim, pg. 47)*

# Evaluation & Assessment Guide

## Officer Evaluation

This evaluation is to be used by the organization leader to provide constructive feedback to student group officers to alert them to areas in which they're strong and to areas in which they need to improve.

Name of Student to be Evaluated: \_\_\_\_\_ Title: \_\_\_\_\_  
Period of Evaluation: \_\_\_\_\_ thru \_\_\_\_\_

**O= Outstanding   V= Very Good   G= Good   A= Adequate   P= Poor   NA= Not Applicable**

### I think the Officer:

**Circle One:**

Shows a sense of direction regarding their job and knows what they should be doing.   **O V G A P NA**

Has the ability to obtain and analyze facts and apply sound judgement.   **O V G A P NA**

Displays enthusiasm about their job.   **O V G A P NA**

Shows a willingness to do more than asked.   **O V G A P NA**

Communicates well with students.   **O V G A P NA**

Communicates well with staff.   **O V G A P NA**

Provides creative ideas and valuable suggestions.   **O V G A P NA**

Follows through on the responsibilities assumed.   **O V G A P NA**

Is on time for meetings, etc.   **O V G A P NA**

Motivates students to work effectively.   **O V G A P NA**

Provides a good example of leadership for others.   **O V G A P NA**

Produces high quality work.   **O V G A P NA**

Displays a sense of professionalism.   **O V G A P NA**

Demonstrates overall effectiveness as an officer.   **O V G A P NA**

### This officer's strengths include:

- 1.
- 2.
- 3.



**This officer's areas for improvement include:**

- 1.
- 2.
- 3.

Overall rating of this officer: Outstanding / Very Good / Good / Adequate / Poor

Additional comments regarding the performance of the officer or general suggestions:

Evaluator's Name: \_\_\_\_\_ Title: \_\_\_\_\_

**Outgoing Executive Board Evaluation**

This document is to be used by the outgoing board at a final board meeting to assess the entire group's process throughout the year. This document should be completed by the outgoing president and executive board and provided to the incoming president.

Have we developed younger members who will prove to be exceptional and involved?

What programs proved successful for us?

What was our greatest achievement as an executive board?

What was our greatest challenge as an executive board?

Three goals we would have liked to accomplish:

- 1.
- 2.
- 3.

Three goals we would like our successors to achieve/build on:

- 1.
- 2.
- 3.

## Goal Setting Guide

### Personal Goal Setting for Your Position

#### Considerations:

Are my goals consistent with my understanding of the purpose of the group? Will the member of my organization agree with my goals? Check with them. Am I being realistic? Can I accomplish my goals during my time in my officer position?

Goals I want to accomplish during my tenure:

1. Projects-

A.

B.

C.

2. Process or manner in which we go about projects (i.e., involving people in decisions, having more members participate in meetings, having more interesting meetings, etc.)

A.

B.

C.

#### Where Can I begin?

What goal seems most important to me?

Do I have the skills necessary to accomplish my goal? Who else in my organization can help me? Are there outside resources and people who might help?

Is there anything I can do before tomorrow to help me reach my goal?

What can I accomplish next week?

What specifically can I do within one month to reach all my goals?

WILL I DO IT?

## Incoming Officer's Keys to the Future

Before you begin goal setting with the members of your organization, you may benefit personally by developing your own goals. The goals may vary in terms of being long or short in range. Some things you may want to think about for yourself might be: the tone you would like to create in your organization, programming ideas, personal growth, the people you will be working with, budgeting, leadership training, etc.

Begin your personal goal setting now by brainstorming what you would like to see happen during the upcoming year.

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Now, list things you can do right away:

Things I want to do starting right now! (Be specific- how, when, where...)

- 1.
- 2.
- 3.

Things I want to get started soon. (When?)

- 1.
- 2.
- 3.

Things the outgoing officer indicated I should do right away:

- 1.
- 2.
- 3.

How do I get started? Is there anything I can do before tomorrow? What specifically?

What can I realistically have accomplished one week from today? One month?

## WORKING WITH YOUR ADVISOR

Your advisor can be a valuable resource if you know what to expect and how to communicate with them. Below is a list of roles that your advisor may take in working with your organization.

1. **Problem Solving Agent:** Your advisor may be the impartial third-party that helps you work through problems and conflict.
2. **Counselor:** You may find that your advisor is the type of person you can go to with your personal concerns.
3. **Information Resource Person:** Hopefully, your advisor has been around long enough to know some of the ins and outs of getting things done at Chaffey. Use their experience and expertise!
4. **Idea Resource Person:** Use your advisor to help discover new ideas when your creative juices dry up.
5. **Sounding Board:** If you want to try out a new idea on an impartial party before proposing it to the entire group, try it out on your advisor.
6. **Administration Liaison:** Rely on your advisor for advice on who in the administration can help you with your projects.
7. **Organization's Representative:** Hopefully, your advisor will represent your concerns to the administrative "powers that be."
8. **Interpreter of Chaffey's Policies and Procedures:** Rely on your advisor's expertise.
9. **Analyzer of the Group Process:** Use your advisor as an observer if things in your organization seem to be stuck.
10. **Role Model:** A positive one, of course!
11. **Attendee/Participant at Events:** Be sure to keep your advisor informed as they must be present at **ALL** events.
12. **Continuity Provider:** Since the advisor is there from year to year as the student leaders change, they can provide a sense of the group's history.
13. **Educator Regarding Organizational Philosophy:** Your advisor can help you plan the training that your group needs to successfully accomplish its mission.
14. **Educator/Trainer of Student Members:** Your advisor can help you plan the training that your group needs to successfully accomplish its mission.
15. **Maintainer of Records:** Make sure that you give your advisor copies of all-important documents so that they can be kept on file.
16. **Conflict Resolution Assistant:** Use your advisor as an impartial mediator.
17. **Financial Supervisor:** Use your advisor's experience with the Chaffey's procedures to help you keep on top of your organization's finances.
18. **Meeting Attender:** Be sure to inform your advisor of all meetings so that they can attend.
19. **Assistant in Evaluating the Organization:** Use your advisor as a resource to determine what you should be evaluating and when.
20. **Empowerer of Students:** Your advisor should be a valuable resource who helps your organization reach good decisions.

*Adapted from: The Wichita State University's Student Organizations' Handbook (1992-1993)*

## Advisee/Advisor Relationships

1. The responsibility for building the relationship must be shared between advisor and student.
  - View this relationship as a partnership.
2. The relationship must be based upon open, direct communication.
  - Share needs, responsibilities, and expectations with each other.
  - Be prepared to negotiate.
3. Both must recognize the other's various roles and responsibilities in/outside of their activities position.
  - Know each other's commitments and let each other know their impacts.
4. Both advisor/students are human beings who make mistakes, follow their own value systems, and work in individual, professional, person styles.
  - Accept, discuss, and learn from mistakes- then move on.
5. Both advisor/students are continually growing, changing, and learning: each within their own unique stages of development. Challenge and support each other.

*Gwost, M.A. (1982). Effective student and advisor relationships. Programming Magazine, Dec.*