

Group Session Facilitator Notes: Officer Transitions

Objectives:

1. To review the successes and challenges of the previous year.
2. To provide closure for the outgoing executive board members.
3. To build collaborative partnerships and common focus for new executive board members.
4. To understand what is expected of new officers.

Materials Needed:

1. Flipchart paper
2. Markers
3. Pen and paper (1 set for each participant)
3. Officer transition worksheets
5. Officer Binders

Outline:

| COMPONENTS | TIME FRAME | RESOURCES |
|------------------------------------|------------|-------------------|
| Open Session | | |
| 1. Review Objectives | 5 min. | Facilitator Notes |
| 2. Individual Officer Meetings | 60 min. | Facilitator Notes |
| 3. Group Discussion | 30 min. | Facilitator Notes |
| 4. Current Executive Board Debrief | 30 min. | Worksheets |
| 5. New Executive Board Meeting | 30 min. | Worksheets |
| Wrap-Up/Closing | 5 min. | |

General Session Notes:

1. All applicable worksheets should be completed before the beginning of the session.
2. Suggested dialogue is written in italics.

Part 1: Review Objectives (5 min.)

Welcome the incoming and outgoing executive board members and thank them for making their participation in this session a priority. Review the objectives of officer transitions and the importance of having them.

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Today we are going to transition to the new executive board members in order to set our organization up for a successful year. We need everyone to participate and be fully engaged in order to have an effective transition. This is an opportunity for new officers to gain some insight into what each position will be responsible for during the upcoming term. This is also an opportunity for outgoing officers to make sure that all of the great things that were put in place and accomplished over the past year are not lost.

Review the session materials and make sure everyone has the correct materials and that the individual worksheets (except for the portions that are to be completed during the session) are completed. Also, take a moment to make sure everyone is on the same page about what is to be accomplished during the session.

It is important that each of you consider the impact a productive transition can have on both the individual executive board members and the organization as a whole. For some of you, your transition might have consisted of simply being told, "Good luck. Call me if you need anything!" Keep in mind that all of the learning on the job that accompanies an experience like that, and what might be lost or delayed due to an officer not being fully prepared at the beginning of their term. Lets ensure that the knowledge transferred and the work accomplished today puts each of the incoming officers, and or organization as a whole, on a path towards success.

Part 2: Individual Officer Meetings (60 min.)

Break participants into one-on-one groups, pairing incoming and outgoing officers by position. During this session the new and old officers should cover the details of the position, using the officer binder as a guide in explaining responsibilities, expectations and available resources that the incoming executive board member can use.

The following items should be covered by the outgoing officer during these meetings:

1. Position description and duties of the position.
2. Outgoing Officer Report worksheet.
3. Officer Notebook Checklist (use as talking points to cover the information and resources included in the notebook).
4. One-on-One Meeting Checklists.

As the meeting progresses, the incoming officer should take notes and answer the questions on the Incoming Officer worksheet, to ensure that key information is retained.

After 45 min., instruct the officers to transition into Q&A to cover any specifics the incoming officer may wish to cover. If any officer pairings were unable to get through all of the information, or significant questions remain unanswered, have them schedule a time to follow-up outside of the session to finish their one-on-one meeting.

Part 3: Group Discussion (30 min.)

This time should be left open for any further questions that might assist new executive board members.

Either as a group, or in smaller sub-groups, the following questions should be addressed:

1. What do outgoing officers wish they knew before they began their position?
2. What can outgoing officers do at this point to help new officers?
3. What was beneficial about the individual meetings?
4. How can the outgoing officers serve as an accountability mechanism for the new officers?
5. What goals were discussed during the officer meetings?