Club Leadership Transition Plan

Office of Student Engagement

Club leaders devote much of their time and energy to successfully lead and move their groups forward during their time at Loyola. At the end of their leadership “term,” clubs are left with ensuring incoming officers are trained and understand the direction of the organization. Without this, new officers must then learn everything from scratch, losing the ability to continue momentum gained the previous year. This transition plan serves to support student leaders in reflection on the current year, and guidance for success in the future. Club leaders should have intentional conversations about the state of their club, define organizational success, and establish means for a smooth transition to new leadership in the upcoming year. Please utilize this plan how you see fit for your organization.

Officer Transition Checklist

* Review current Club Constitution and make any necessary changes. If any changes are made, email a copy to Student Engagement.
* Consider having each outgoing officer complete a position reflection (including responsibilities and job description).
* Organize meeting agendas, notes, and other important information and upload it to your group page on The Bridge.
* Begin the club re-registration process found on The Bridge. It may be helpful to do this with one of the incoming officers or new lead officer.
* Create a plan to train new officers, have them shadow outgoing officers. Consider utilizing the Transition Meeting Agenda, found below.
* Introduce new officers to the club moderator.
* Connect new officers to important resources and contacts on campus. This includes any social media logins.

Transition Meeting: Sample Agenda

Schedule some time for the old and new club officers to get together for a transition meeting. This meeting offers continuity and continued growth for the organization while allowing new officers to learn from the experiences of outgoing officers. Students should foster a casual, open atmosphere to have an open, honest evaluation of the accomplishments and pain points of the previous year. Review and reflect on the following:

1. Welcome and Introductions (if needed)

Get participants acquainted and explain the purpose of the meeting.

1. The Year in Review – Assessment of Goals

What did we hope to accomplish?

How well did we do on each goal?

What goals would we like incoming and future officers to achieve and build on?

1. Programs, Events, Activities, and Initiatives: What did your group do?

What did we do this year? What, if any of these events will the club plan to do next year?

Did we have a good balance in our schedule or programs and activities?

Were our programs and activities consistent with out goals?

Discuss the planning and execution of each event for future reference.

1. Membership and Commitment

What did we do to recruit new members? Was this successful? What might the club do in the future to improve recruitment efforts?

Are our members actively involved? What opportunities are there for members to increase their involvement in a meaningful way? What steps do we need to take to ensure these opportunities are available for members?

1. Officers and Club Structure

Are officer roles and responsibilities clearly described?

Did officers work as a team, or is there more teamwork needed?

Outline any action steps needed to grow as an officer team.

1. Club Moderator

Did our moderator provide the support we needed?

Did we give our moderator a chance to get involved?

What are your own expectations for a club moderator and how do you see your club’s moderator interacting with the club next year?

1. Club Image

How do we “see” the club? What is the perception of our club, how do others “see” us?

What can we do to enhance our club image around campus?

1. Moving Forward

What is the best piece of advice you can give to incoming officers?

What is helpful for new officers to know moving forward?

What support will your club need from Student Engagement to be successful next year?