

Student Organization Officer Transition Guide

*Adapted from: Office of Student Life at
California State University, Dominguez Hills*

TABLE OF CONTENTS

Outgoing Officer's Guide	pp.	2-8
Student Organization Officer Transition Outline	pp.	2-4
Binders / Files / Notebooks	pp.	4
Outgoing Officer To Do List	pp.	4
Outgoing Officer Worksheet	pp.	5
Maintaining Continuity: Transition Questions	pp.	6
One-on-One Meeting Handout for Transition	pp.	7
Outgoing Major Accomplishments Spreadsheet	pp.	8
Incoming Officer's Guide	pp.	9-12
Your Role as a Student Leader	pp.	9
Incoming Officer Transition Worksheet	pp.	10
Maintaining Continuity: Transition Questions	pp.	11
Incoming Officers: Goals, Dreams, Priorities Spreadsheet	pp.	12
Evaluation and Assessment	pp.	20
Officer / Chair Assessment	pp.	20
Outgoing Executive Council Evaluation	pp.	20
Goal Setting Guide	pp.	21-22
Goal Setting	pp.	21
Incoming Officer Keys to the Future	pp.	22
Guide to Working With Your Advisor	pp.	23-24
The Role of your Advisor	pp.	23
The Role of your Organization's Faculty Advisor	pp.	24
Motivation	pp.	25-26
Ten Commandments for Student Leaders	pp.	25
How to Make an Impact as a Student Leader	pp.	26

OUTGOING OFFICER GUIDE

Student Organization Officer Transition 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. The following outline can help you make your transition meeting fo as smoothly as possible.

- I. *Welcome and Introductions*
(Help participants get acquainted and explain the purpose of the meeting)

- II. *The Year in Review*
 - A. **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?

 - B. **Programs and Activities:** 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?

 - C. **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?

 - D. **Officers and Organizational 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?

 - E. **Organizational 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? F. **Faculty Involvement:** Evaluate both quality and quantity. 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?

- G. **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?

III. *Your Legacy to the New Officer Team*

- A. What are the current strengths and weaknesses of the group?
- B. What is the best advice you can give your successor?
- C. What were there major challenges and accomplishments in your term?

IV. *Officer Transition*

Have the new and outgoing officers meet individually to discuss:

- A. Responsibilities of the position, with a job description if possible.
- B. A timetable for completion of annual duties.
- C. Unfinished projects.
- D. Important contacts and resource persons.
- E. Mistakes that could have been avoided.
- F. Advice for the new officer.
- G. Any questions the new officer may have.
- H. Where the outgoing officer can be reached with future questions.

V. *Wrap-Up*

"Pass the gavel" in a semi-official ceremony and wish everyone luck! Provide an opportunity for informal socializing.

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

Binders / Files / Notebooks Officer Handbook

Should Include:

1. University Mission Statement
2. Organizational Mission Statement
3. Organizational Constitution and By-Laws
4. Organizational Policies and Procedures
5. Governing Organization Constitution and By-Laws (PHC, IFC, etc.)
6. Important names and numbers (contact list)
7. Student leader job descriptions
8. Budget information
9. Year-end reports and evaluations
10. Pertinent correspondence
11. Resource list
12. Organizational Calendar
13. Important forms
14. University policies and handbook
15. Organizational goals - both met and unmet
16. Name and contact information of outgoing officers
17. Unfinished project information
18. Organizational Goals
19. Specific Officer / Position goals
20. Judicial Policies - Organizational and University
21. Agendas and Meeting Minutes
22. Committee Reports

Outgoing Officer To Do List

1. Organize all notebooks and files
2. Finish all necessary correspondence (letters, e-mail, phone calls)
3. Prepare year-end report and evaluation
4. Develop action plan and time-line for new officer transition
 1. Including but not limited to:
 1. Necessary meetings attended and conducted by officer
 2. Important tasks
 3. Sharing tasks and duties with other group members
 4. Introductions to key people / Relationship building
 5. One on one meetings and training
 6. Financial Information
 7. Leadership training
5. Complete Outgoing officer information sheet(s) - Enclosed
6. Prepare / Update Officer Handbook

Outgoing Officer Worksheet

[To be completed before transition meetings and training sessions]

Please think through and respond to the following questions regarding your responsibilities. This information will be helpful to your successor.

- 7. What I liked best about my job...

- 8. What I liked least about my job...

- 9. The most difficult decision I made was...

- 10. What I could have done to make the experience better was...

- 11. Obstacles to performing my job effectively were...

- 12. Aids which assisted me in handling my job were...

- 13. Things I wish I'd known before I took the job were...

Maintaining Continuity: Transition Questions Old Officers

Directions: 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. What do you perceive to be your organizations objectives or goals?
2. What do you consider to be the responsibility of your office?
3. What do you wish you had done, but did not?
4. What did you try that did not work? Why did it not work?
5. What problems or areas will require attention within the next year?
6. Who was the most helpful in getting things done? (Who were good resources?)
7. What should be done immediately in the fall?

One-on-One Meeting Handout

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

Office: _____ Name: _____

Date: _____

1. List other officers / chairmen with whom you worked and the 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, university / 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.

Source: NIC Retreat Workbook (verbatim, pg. 47)

Outgoing Officers Major Accomplishments

Accomplishments	Barriers / Limitations	Resources	Solutions	Still to Be Done

INCOMING OFFICER 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 Officer's Transition Worksheet
[Questions to ask during transition]

Please think through and respond to the following questions regarding your responsibilities. This information will be helpful to your successor.

14. Things specific to the position I want to know about (forms, duties, etc...)

15. Things I should do over the summer...

16. People (positions) that I should get to know...

17. Services that I need to know about...

18. Things I need to know about working with my advisor...

19. Other questions I want answered...

Maintaining Continuity: Transition Questions New Officers

Directions: Many of these questions are geared toward former, or out-going officers. New officers can use these questions to brainstorm ideas or goals for the upcoming term of office.

1. What do you perceive to be your organization's objectives or goals?

2. What do you consider to be the responsibilities of your office?

3. What are your expectations of yourself in the office?

4. What expectations do you have of the executive council?

5. What expectations do you believe your members have of you?

6. What problems or areas will require attention within the next year?

7. What should be done immediately in the fall?

8. Who do you anticipate will be most helpful in getting things done? (People outside your organization such as advisors, professors, administrative staff, etc.)

9. Write down one specific problem you anticipate you will encounter during your term.

Incoming Officers - "Goals, Dreams, & Priorities"

Things We Would Like
To Accomplish

Barriers / Limitations

Resources

Unknown Questions

Why We Want This

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

EVALUATION & ASSESSMENT GUIDE

EVALUATION AND ASSESSMENT

Officer / Chair Evaluation

This evaluation is to constructively evaluate student group officers / chairs to let you know what areas you are strong in and what areas you need to improve.

Name of Student to be Evaluated: _____

Period of Evaluation: _____ through _____

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

I Feel the Officer / Chair:

Shows a sense of direction regarding his/her job and knows what he / she 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
Is effective at organizing his / her work.		O	V	G	A	P	NA
Displays enthusiasm about his / her 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 thru 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	
Is objective in decision making.		O	V	G	A	P	NA
Produces a high-quality work.	O	V	G	A	P	NA	
Displays a sense of professionalism.	O	V	G	A	P	NA	
Overall effectiveness as an officer / chair.	O	V	G	A	P	NA	

I think this officer's / chair's strengths are:

- 1.
- 2.
- 3.

I think this officer's / chair's areas of improvement are:

- 1.
- 2.
- 3.

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

Additional comments regarding the performance of the officer / chair and / or general suggestions:

EVALUATION AND ASSESSMENT

Outgoing Executive Council Evaluation

1. Have we developed younger members who will prove to be exceptional and involved?
2. Will the membership be innovative and creative after we have left?
3. What programs or governing practices proved to be successful for us?
4. What was our greatest achievement as an executive council?
5. What was our greatest challenge as an executive council?
6. Three goals we would have liked to accomplish:
7. Three goals we would like our successors to achieve / build on:

GOAL SETTING GUIDE

GOAL SETTING

Considerations:

Are my goals consistent with my understanding of the purpose of the group?

Will the members of my organization agree with my goals? Check with them.

Am I being realistic? Can I accomplish my goals during my tenure as organization leader?

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?

Which 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 resource 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 own goal setting now by brainstorming for possibilities of what you would like to be about during the upcoming year.

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 on soon: (when?)

- 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

The Role of the Advisor

As Viewed by the Advisor:

- Resource Person
- Friend / Counselor
- Pick up the pieces when necessary
- Assist in planning
- Play devil's advocate
- Help set goals
- Help maintain direction and provide continuity
- Stimulate creativity and motivation
- Serve as a sounding board for students
- Facilitator for group process
- Be accessible

As Viewed by Student Leaders:

- Resource Person
- Positive reinforcement and support
- Constructive criticism
- Serve as liaison between organization and university
- Deal with legal and contractual matters
- Attend committee meetings
- Advise on specific University procedures
- Be available
- Discuss ideas, but don't dictate
- Support events by attending
- Play devil's advocate when needed
- Brainstorming
- Realize leaders are volunteers

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 impact.
4. Both advisor / student 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 / student 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.

The Role of Your Organization's Faculty Advisor

What is your advisor supposed to be doing? Your advisor can be a valuable resource, if you know what to expect and how to communicate with him or her. 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. 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 University Policies and Procedures*: Rely on your advisors 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 so that he or she can at least put in an appearance to show support.
12. *Continuity Provider*: Since the advisor is there from year to year as the student leaders change, he or she 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 University 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 he or she 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)

MOTIVATION

Keeping Your Officers and Organization Members Motivated Throughout the Year

Ten Commandments for Student Leaders

1. Look upon all of it as a learning experience.
2. Mistakes are inevitable. You have to learn to live with them, and so do others.
3. Don't get caught up with global issues, such as remaking the whole University and outgunning the Trustees. Politics is the art of the possible; so pick out some realistic goals and really go for them.
4. Try to strike up a friendship with the administration. They aren't really bad guys and you might have something to learn from them. Also, they are not automatic adversaries. Believe it or not, they like you and want to be helpful as you mature into real leaders.
5. The common good is terribly important. It means the common good for students, faculty, and for the whole University community. You are part of it, so work for it.
6. Be honest, especially with yourselves. Integrity is probably the best quality of a leader.
7. Be open minded. No other attitude makes learning possible. As Winston Churchill said, "All complicated questions have simple answers. However, they are all wrong."
8. Be fair, even with grown-ups. Fairness will win them more than anything else.
9. Don't be cynical. A cynic accomplishes nothing. All of us have to be shocked by the injustices we face in life. Cynicism will never conquer them and attain justice.
10. This will probably sound silly, but my bottom line is laughter and love. It is important to be able to laugh at ourselves which means not to take ourselves too seriously, whether we are President or freshman. Somehow laughter gets us through the most difficult of solutions, but love is important, too, because in a very real sense, we can't work together unless we respect and love each other, young and old.

Taken from letter from Rev. Theodore M. Hesburgh, C.S.C. President of Notre Dame dated 10/30/95

How to Make an Impact as a Student Leader

1. Be a role model.
2. Confront unacceptable behavior.
3. Utilize training experiences.
4. Find the “teachable moment.”
5. Be supportive of others.
6. Actions should reflect words - be consistent.
7. Develop expectations.
8. Present programs that are reflective of your values and organizational values.
9. Be consistent in your organizational promotions / advertisement.
10. Structure experiences.
11. Lead discussion sessions on values and ethics.
12. Develop an organizational and/or personal code of ethics.
13. Make a difference in all that you do!

NACA National Convention, February 1991