

Student Organization Officer Transition Guide

Southern Illinois University
Carbondale
Office of Student Engagement



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Introduction

Dear Student Organization Leader:

The Office of Student Engagement regularly sees Registered Student Organization (RSO) leaders devote many hours successfully leading their RSO during their term and then leave the positions without successfully training their new officers. When this happens, it inhibits the new executive board's ability to lead their RSO efficiently. Previous executive teams do not pass on information and lessons learned to the incoming officers. Depending on your RSO, this can significantly impact the ability to execute their role effectively and efficiently.

Without taking the time to transition incoming officers effectively, organizations lose the opportunity to continue the momentum gained in previous years. The new exec should use this time to move the organizations forward and accomplish new goals instead of catching up on old tasks.

The Office of Student Engagement designed this packet to help student organization leaders have the tools to transition outgoing and incoming officers successfully.

This packet intends to empower students to have intentional conversations, minimize turnover effects within student organizations, increase an organization's success, and continue momentum accomplished by groups during the previous years.

You will fill out individual forms and forms that will be part of the overall packet – we encourage you to tailor it to fit your organization's needs.

The Student Organization Officer Transition Guide has two sections:

- Outgoing Officer/Executive Board Transition
- New Board Transition/Future Goal Setting
- Working with your Advisor

We hope you utilize this packet to navigate a successful transition. Please contact our office at (618) 453-5714 or email us at rsohelp@siu.edu for further questions or help.

Sincerely,
The Office of Student Engagement

OUTGOING OFFICER GUIDE

Outgoing Officer To-Do List

In addition to gathering information for the new board members, the outgoing officer should complete all outstanding projects before officer transitions. Please check this list to ensure the completion of all necessary items.

1. Make sure to send your Advisor the list of new officers. Be sure to include the officer's name, title, dawgtag, contact phone number, and email. Introduce new officers to your Advisor and have a conversation about how they can assist with organization processes.
2. Make sure space is reserved for all annual events and get a copy of these reservations.
3. Organize all notebooks and files.
4. Finish all necessary correspondence (letters, email, phone calls).
5. Prepare year-end report and evaluation, **if necessary**.
6. Develop an action plan and timeline for new officer transition, including but not limited to:
 - a. Necessary meetings attended and conducted by the officer
 - b. Important tasks
 - c. Sharing tasks and duties with other group members
 - d. Introductions to critical people / Relationship building
 - e. One on one meetings and training
 - f. Financial Information
 - g. Leadership Training
7. Complete Outgoing Officer Information Sheets (part of this packet)
8. Schedule a joint retreat or meeting between outgoing and incoming officers.
9. Ensure all contracts, bills, invoices, and outstanding balances are completed and processed, and all necessary payments have been made. If outstanding items are in process at the time of transition, write a memo to the new officer noting what needs.
10. Update your Saluki Connect page's roster section to ensure the president and treasurer have the appropriate permissions for Saluki connect.
11. Allow incoming officers to shadow outgoing officers if time permits.
12. Create an officer transition binder (see next page for a suggested list of what to include).

Preparing Binders/Files/Notebooks

Officer Handbook

To properly transition, outgoing officers should keep the following documents throughout the year and organize them in a binder to hand off to the new officer.

Suggestions for What to Include:

Items Related to the Organization:

1. Organizational Mission Statement
2. Organizational Constitution and By-Laws
3. Organizational Policies and Procedures
4. Governing Organization Constitution and By-Laws
5. Descriptions of exec positions and committee roles
6. Budget information
7. Year-end reports and evaluations
8. Organizational Calendar
9. Organizational Goals
10. Specific Officer / Position goals
11. Agendas and Meeting Minutes
12. Committee Reports

Items Related to the University:

1. University Mission Statement
2. University policies and handbook
3. [Registered Student Organization Handbook](#)

Additional Helpful Resources:

1. Important names and numbers (contact list)
2. Pertinent correspondence
3. Resource list
4. Important forms
5. Organizational goals - both met and unmet
6. Name and contact information of outgoing officers
7. Unfinished project information
8. Do's and Don'ts, helpful hints, and lessons learned

Outgoing Officer Worksheet

[To be completed by the outgoing officer before transition meetings and training sessions]

Position Title: _____

Name: _____

Phone Number: _____

Email Address: _____

Date: _____

Directions: Please think through and respond to the following questions regarding your responsibilities; this will help your successor. Lessons learned from this reflection can be shared with incoming officers verbally or in written format.

The responsibilities of my position included:

List other officers with whom you worked and the projects involved:

List what you enjoyed most and least regarding your position:

Who was the most helpful in getting things done? Who were good resources? List other aids that helped complete your job:

Things you wish you had known before you took the job include:

List specific accomplishments realized during your term in office and the reasons for their success. What did you try that worked well and would suggest doing again? Why?

List any problems or disappointments you encountered as a part of your position and suggest how to avoid or correct them. What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?

What could you have done to make this a better experience?

List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, University staff members, community resources, etc.

Create a timetable/list of important dates related to your position. Provide suggestions for increasing efficiency and effectiveness.

What should be done immediately during the summer? In the fall?

List any other suggestions you feel would help your successor in carrying out the responsibilities of this office.

Source: NIC Retreat Workbook (pg. 47)

Outgoing Officers Major Accomplishments

Accomplishments	Barriers/Limitations	Resources	Solutions	Still To Be Done

Outgoing Executive Board Evaluation

The outgoing board will use this document 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 or governing practices proved successful for us?

What was our most significant achievement as an executive board?

What was our greatest challenge as an executive board?

Three goals we would have liked to accomplish:

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

Student Organization Officer 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. Such a transition meeting provides continuity and continued growth for the organization while allowing the new officers to learn from the outgoing officers' experiences. A casual, open atmosphere should be encouraged so the organization can benefit from an honest evaluation of the previous year's accomplishments and issues. The following outline can help make the transition meeting flow as smoothly as possible.

1. Welcome and Introductions

- a. Help participants get acquainted and explain the purpose of the meeting

2. The Year in Review

a. Goals:

- i. Review the group's goals for the previous year.
- ii. What did we hope to accomplish?
- iii. How well did we do on each goal?
- iv. What goals should be continued this year?
- v. What goals need to be changed?
- vi. What goals are no longer feasible?

b. Programs and Activities:

- i. Evaluate what your group did.
- ii. How effective were the programs and activities we sponsored? How did we measure their effectiveness?
- iii. Did we have the right balance of programs and activities?
- iv. Were our programs and activities consistent with our goals?
- v. What activities and programs do we want to repeat?

c. Membership:

- i. Evaluate the number of members and their commitment.
- ii. Do we have the right amount of members?
- iii. What actions did we take to recruit members?
- iv. Were our recruitment efforts successful?
- v. Are our members as actively involved as we want them to be?
- vi. What were the opportunities for members to get involved in a meaningful way?

d. Officers and Organizational Structure:

- i. Evaluate officers and structure.
- ii. Are officer roles and responsibilities clearly described? How?
- iii. Did officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
- iv. Are the time and effort required in each position comparable?
- v. Is there two-way communication between officers and members?
- vi. How do the members feel about the officers?

- e. **Organizational Operations:**
 - i. Evaluate finances, communication, etc.
 - ii. Were the finances adequate for our group and managed properly?
 - iii. Were meetings run effectively? Was their frequency adequate?
 - iv. Did the committee structure work?
 - v. Did we have scheduling conflicts with other groups or activities?

- f. **Advisor Involvement:**
 - i. Evaluate both quality and quantity.
 - ii. Did our Advisor provide the support we needed?
 - iii. Did we give our advisors and other faculty a chance to get involved?
 - iv. How could we improve faculty and advisor involvement?

- g. **Public Image:**
 - i. Evaluate how other groups perceive you.
 - ii. How do we see ourselves? Is this how "outsiders" see us?
 - iii. How can we enhance our image?

3. *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 their significant challenges and accomplishments?

4. *Officer Transition*

- a. Have the new and outgoing officers meet individually to discuss:
 - i. Responsibilities of the position, with a job description
 - ii. A timetable for completion of annual duties
 - iii. Unfinished projects
 - iv. Essential contacts and resource persons
 - v. Avoidable mistakes
 - vi. Advice for the new officer
 - vii. Any questions the new officer may have
 - viii. How to contact outgoing officers

5. *Wrap-Up*

- a. "Pass the gavel" in a semi-official ceremony in front of the outgoing and incoming board and wish everyone luck!
- b. Provide an opportunity for informal socializing.

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

INCOMING OFFICER GUIDE

Overview of Your Role as a Student Leader

Keeping these guidelines in mind will help you succeed, and your peers respect you!

1. **Work on the morale of your organization members.** Unless they feel good about their roles and their contribution, your organization members will not be as cooperative and productive as they could be. It is part of your role to recruit and retain your members – remember to recognize all your members' efforts to let them know they are valued.
2. **Expect many changes to be accepted gradually.** After thinking about new ideas and events for months, sometimes we expect people to accept these changes immediately. Remember that they need time to consider your proposals (no matter how enthusiastic you are) and may want their feedback incorporated into your new ideas.
3. **Be available to help those who want your help.** Some people will need more help than others – but don't force your help upon those who are quite able and willing to accomplish tasks. You'll need to observe who needs your help and when to offer it. You should try never to turn down an opportunity to respond to someone's request for help – you just might be developing a future leader of your organization!
4. **Let your organization members determine the group's purpose.** Everyone likes to feel they are a part of the organization's success. Unless organization 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.** You will encounter some challenges and even failures in the organization. A real test of an organization's leadership is how you navigate those tough times and learn from mistakes. Your result may not be the organization's original goal – but it could be better! Don't lose sight of a good result just because it is different than imagined.
6. **Approach change through cooperative appraisal.** We can get a little defensive when discussing change or altering plans for "a better option." As a leader, try to base decisions and discussions on what is right rather than who is right.
7. **Encourage brainstorming and creativity.** Always provide feedback and support for new ideas and avoid penalizing for mistakes made for the sake of experimentation. Encourage your members to think outside of the box. Sometimes this can create some "crazy" ideas, but the organization needs to work through those ideas to see what is possible. If you stop the creative process too soon, you might miss out on the best ideas.
8. **Share decisions regarding policies and procedures.** Explain and discuss – don't dictate. By emphasizing how to solve problems, and involving your members in these decisions, you will create a deeper connection to the organization. The more involved you keep your members, the better the retention of your members.
9. **Recognize criticism as the first step individuals take in assuming responsibility.** You will learn to quickly swallow your pride as a leader for the betterment of the organization. Criticism can be a little "prickly," especially if you have worked very hard on something. However, this is a chance to gain suggestions and insight into improvements to make the organization stronger. It's not personal. People usually offer suggestions and criticism because they want to help. When people stop taking notice of what needs improving, then they have stopped caring.

10. **Share the glory.** Are you noticing a pattern? To keep members engaged in your organization, they need to feel valued. If you take all the credit or allow a member's contribution to go unnoticed, what message are you sending?
11. **Have faith and confidence in the ability of your group.** People tend to live up to our expectations – 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. Address individual concerns at other times.
13. **Trust the motives of all group members.** Similar to working through the group's creativity and brainstorming processes, pay every suggestion 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 – in fact, you'll earn more respect when you set an example that anyone can make a mistake. How you recover from a mistake or failure is one of the true tests of a leader.
15. **Be specific.** Communicate exactly what you expect and think.
16. **Be socially aware.** Don't try to be funny at the expense of other organization members (or non-organization members).
17. **Use the inquiry method.** Use questions to get information and define issues. Give people a chance to provide some answers to questions or issues that come up. When a situation is given to you to solve, pose it back to the organization as a question. You'll be surprised by the number of solutions that exist within the organization.
18. **Be impartial.** Give all organization members a chance to participate in all aspects of the organization. Do not play favorites – you'll quickly alienate members.
19. **Promote organization cohesiveness.** Help all organization members feel as if they belong.
20. **Manage conflict, don't ignore it.** Bring conflict into the open by addressing it directly and with as little personal bias as possible. Concentrate on the issues, behaviors, and facts rather than personalities.

Adapted from: Pace University's Center for Student Development and Campus Activities

Incoming Officer's Transition Worksheet

The new officer can ask the outgoing officer these questions to gain a solid understanding of their new position.

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

Things I should do over the summer...

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

Services that I need to know...

Things I need to know about working with my Advisor...

Other questions I want to be answered...

What do you consider to be the responsibilities of your position?

What expectations do you have of the executive council/board?

What expectations do you believe your members have of you?

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

What should I do immediately?

I have discussed the forms in the Student Org Officer Transition Guide with and given/explained all org materials (including electronic forms) to the incoming officer.

(Outgoing Officer Signature) (Date)

I have discussed the forms in the Student Org Officer Transition Guide as well as all org materials (including electronic forms) the outgoing officer has shared with me.

(Incoming Officer Signature) (Date)

Adapted from: Old Dominion University's Organization Transition Guide (2008-2009)

Personal Goal Setting for your Position

Before you begin goal setting with your organization's members, 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.

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.

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?

Goal Setting Guide – Further Considerations...

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 realistic in my goals? Can I accomplish my goals during my tenure as my organization's 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 exciting 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 precisely can I do within one month to reach all my goals?

WORKING WITH YOUR ADVISOR

The Role of Your Organization's 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 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 SIU. Use their experience and expertise!
4. *Idea Resource Person*: Use your Advisor to help discover new ideas.
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*: Your Advisor will represent your concerns to the administrative "powers that be."
8. *Interpreter of University 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 so that he/she can at least make an appearance to show support.
12. *Continuity Provider*: Since the Advisor is there from year to year as the student leaders change, he/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 accomplish its mission.
14. *Educator / Trainer of Student Members*: Your Advisor can help you plan the training that your group needs to accomplish its mission.

15. *Maintainer of Records*: Make sure that you give your advisor copies of all necessary 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 stay on top of your organization's finances.
18. *Meeting Attendee*: Be sure to inform your Advisor of all meetings so that he/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 that helps your organization reach sound decisions.

Advisor Expectations Worksheet

The role of an advisor greatly varies, but it is always an important one. An advisor should be committed to the student organization's success and may sometimes need to go above and beyond the call of duty. Considering their expertise and experience, advisors can often supply significant knowledge on goal setting, event planning, conflict resolution, and overall group development. The purpose of this contract is for the advisor and student leaders to help determine what role the Advisor will play within the student organization.

Directions: The Advisor and student leaders should complete the questionnaire separately and then meet to discuss their answers. It is helpful if student leaders complete as an executive team.

For each statement, respond according to the following scale:

- 1 = Absolutely not an advisor's role.
- 2 = Would prefer the Advisor not do.
- 3 = Nice, but the Advisor does not have to do it.
- 4 = Helpful for the Advisor to do.
- 5 = Essential for the Advisor.

Student Org Name:	Score:
Attend all general meetings of the organization	
Attend all executive committee meetings	
Meet with president before each meeting	
Help the president prepare for each meeting	
Exert influence with officers between meetings	
Take an active part in formulating the goals of the group	
Attend all group activities, meetings, events	
Be a custodian of all group materials, supplies, etc. during summer and between officer transitions	
Call meetings of the officers when believed to be necessary	
Explain University policies where appropriate	
Explain University policies to the membership once per year	
Speak up during discussion when the group is about to make a poor decision	
Be quiet during general meetings unless called upon	
Provide resources and ideas to the group	
Act as a member of the group, except in voting and holding office	
Take the initiative in developing teamwork and cooperation among officers	
Receive a copy of all correspondence	
Request a financial update at the end of every semester	
Keep the official files of the organization	
Let the group work out its problems, including making mistakes	
Request a written report of the group's activity at the end of each year	
Cancel any activities when you believe they have been inadequately planned, will violate University rules, or are unsafe	
Take an active part in officer transition & training	
Represent the group in any conflict with members of university staff	
Understand how issues of diversity affect the organization	
Mediate conflicts as they arise	
Keep group aware of its stated goals, purpose, and objectives	
Take an active part in orderly transitions of responsibilities between old and new officers at the end of the year	
Require an evaluation of each activity by those students responsible for planning it	
Let the group thrive or decline on its own; do not interfere unless requested	
Be responsible for planning leadership skills workshops	

Adapted from the University of North Carolina-Charlotte and University of Miami

Name of Student Organization: _____

Advisor _____
Name _____ Signature _____

Officers _____
Name _____ Signature _____

Name Signature

Name Signature

Name Signature

Name Signature

Date of Completion: _____

By signing this agreement, the student organization's Advisor and officers agree to have a positive working relationship and meet the stated expectations agreed upon above. The Advisor and officers also agree that they will communicate to one another if expectations are not being met to revise expectations throughout the academic year.