

Sam Houston State University – A Member of The Texas State University System

Sam Houston State University

Leadership Initiatives



Student Organization Officer Transition Guide

Source of this guide and adapted with permission: The Student Organization Officer Transition Guide from Old Dominion University's Office of Student Life Activities and Leadership

Dear Student Organization Leader:

Too often, the Department of Leadership Initiatives has seen student organization leaders dedicate themselves to successfully leading their groups for an academic year and at the end of the term, leave their positions without time spent making sure the incoming officers have the opportunity to be trained.

When no transition occurs, all the information regarding the previous year's lessons-learned are not passed on to the incoming officers, thus slowing down their progress. **Without taking the time to effectively transition incoming officers, organizations lose the opportunity to continue momentum gained in the previous year.** Time that could be used moving the organizations forward and accomplishing new goals is spent catching up.

The National Association of Campus Activities defines effective transition as:

“Effective leadership transition is the process by which past and future student leaders in an organization **work together to review and learn from previous events and programs and prepare for the upcoming year.** This process can occur in one or several days and may be accomplished in a formal or informal setting. The transition process an organization chooses to use during this time period truly depends on the needs and resources available to the group.” – “8 Tips for Effective Student Leader Transition,” *Campus Activities Programming*, May 2009

This packet is designed to help all officers and student organization leaders have the tools to successfully transition outgoing and incoming officers. The forms in this packet are meant to empower students to **have intentional conversations with one another to minimize the effects of turnover within student organizations, increase organizations' success, and continue momentum accomplished by groups during the previous year.**

The Student Organization Officer Transition Guide is designed to be used in sections:

- Outgoing Officer: Executive Board Transition/Annual Recognition Requirements
- Incoming Officer: New Board Transition/Future Goal Setting/Operations Records

The forms in the packet are designed to be used individually as well as part of the greater packet – we encourage you to tailor it to fit the needs of your organization.

We hope you utilize this packet to navigate a successful transition. Please contact our office at 936-294-3000 or email us at leadership@shsu.edu for any further questions or help.

Sincerely,

SHSU Department of Leadership Initiatives

Parts of this transition guide were adapted from the Ithaca College, The University of Southern Mississippi, and Ohio University.

WHY Transition?

Purpose of Officer Transition

- Transfer ownership and historical knowledge of the organization
- Maintain seamless continuity of the organization’s progress, growth, and goals
- Reinforce productive communication and support between officers to plan and create new goals
- Further develop sense of pride and mission-aligned purpose in the new officers

Transition Recommendation

When transitioning officer duties, we recommend following the outlined steps:

1. Outgoing officers complete the ‘outgoing officer checklist’ and ‘outgoing officer worksheet’
2. Incoming officers complete the ‘incoming officer worksheet’
3. Outgoing and new officer board meet for transition meeting (sample agenda included)
 - a. During the group transition meeting, ensure time is allocated for one-on-one meetings for individual officer transitions

Outgoing Officer Checklist

Use the following checklist to guide transition from outgoing to incoming officers. The best practice is to provide too much information, rather than not enough.

Documentation	People	Additional Tasks
<input type="checkbox"/> Organize all files, notebooks, binders, and electronic files in an accessible place	<input type="checkbox"/> Plan any necessary training needed for new officers	<input type="checkbox"/> Reserve meeting rooms for upcoming year on Virtual EMS through the LSC
<input type="checkbox"/> Update organization constitution and bylaws	<input type="checkbox"/> Introduce officers to important organization contacts via email or in person meeting	<input type="checkbox"/> Finish all necessary correspondence (emails, etc.)
<input type="checkbox"/> Prepare updated Officer Operations Records (instructions/check-list provided in this guide)	<input type="checkbox"/> Connect new officers with your organization advisor	<input type="checkbox"/> Re-register the organization on OrgLINK by August 1
<input type="checkbox"/> Obtain financial and banking information including the EIN	<input type="checkbox"/> Provide outgoing officer information, phone numbers, and emails	<input type="checkbox"/> Clean up your Roster on OrgLINK – make sure it accurately reflects the current membership, officers, and advisor
<input type="checkbox"/> Make an asset list of your organization supplies and where to find them	<input type="checkbox"/> Share organization member contact information (emails, phone numbers, etc.)	<input type="checkbox"/> Share important training dates, upcoming opportunities/tasks/training information with new officers (e.g. Organization fairs, SOLR, SORT), etc.
<input type="checkbox"/> Document any login information for social media, banking, email accounts, etc.		
<input type="checkbox"/> Create a commonly used resource list (contacts, room booking links, vendors, etc.)		

Timelines and Event Specific Transitions

If your organization has annual events or traditions, be sure to share a timeline of events and funding information with incoming officers.

Time Orientation	Event-Specific
<ul style="list-style-type: none"><input type="checkbox"/> Make a detailed calendar and timeline of your organization’s meetings, events, and activities <input type="checkbox"/> Document campus events for new officers to be aware of/plan around or plan to attend (e.g. Organization Fairs, Homecoming, Family Weekend, Battle of the Piney Woods, Tree of Light, etc.) <input type="checkbox"/> Document Student Affairs Travel & Campus Life Development Funding deadlines and rules	<ul style="list-style-type: none"><input type="checkbox"/> Provide previous event planning checklists, risk management plans, and statistics of attendance <input type="checkbox"/> Plan room reservations, advertising, budgeting, etc. <input type="checkbox"/> Plan marketing: electronic copies, OrgLINK event requests, etc. <input type="checkbox"/> Complete any funding requests through the Vice President of Student Affairs Office – share past budget requests and awards with new officers for reference <input type="checkbox"/> Complete an “After Event Action” list of any notes you want to keep to help improve future events that are similar

Annual Recognition Requirements

The following items must be shared with incoming officers during the transition period. Adherence to the dates and items listed below will ensure your organization obtains recognition from SHSU for the upcoming academic year.

1. Register Each Academic Year

- ***Due: August 1***
- Where: OrgLINK (under organizations)
- Why: Completing re-registration will ensure your organization's page on OrgLINK is up to date, which is your best marketing tool for incoming students and potential members. It also provides SHSU with the most current contact information for your student organization, which will keep you in compliance with the SHSU Student Guidelines.
- Notes: Open yearly from April 15-August 1

2. Student Organization Required Training

- ***Due: September 1***
- Where: OrgLINK (under forms)
- Why: The State of Texas and SHSU require all student organizations seeking annual recognition to complete this required training module to ensure compliance with policies and guidelines. This training will provide required information and helpful information for your organization to succeed.
- Notes: Open yearly from July 15-September 1; One student member must complete this online training on behalf of each student organization; Student representatives cannot complete the training on behalf of more than one student organization

3. Student Organization Leadership Retreat

- ***Date: August (usually held shortly before the fall semester begins)***
- Where: In-person training event
- Why: Kick off the academic year as a successful student leader through attending this annual training event. Important updates, topics, and questions will be covered in this training to set you on the path to success.
- Notes: One student member must attend this retreat on behalf of each student organization; Student representatives cannot attend on behalf of more than one student organization

4. Ongoing Requirements to Maintain "Good Standing" for Continued Recognition

- Follow all policies stated in the SHSU Student Guidelines
- Update your organization's roster on OrgLINK within 3 business days of any changes
- Submit all events via OrgLINK at least 5 business days in advance of event
- Submit travel forms via OrgLINK for any travel more than 25 miles from main campus at least 10 business days in advance of travel

Outgoing Officer Transition Worksheet

[Complete before transition meeting discussion]

This worksheet should be completed by each outgoing officer. Completing the worksheet will help incoming officers achieve success in the role. Consider what would have been helpful to know when you began your role. The more thorough and detailed you can be, the more helpful you will be in training and preparing the incoming officer. Going over your answers together will provide an opportunity for the incoming officer to ask questions.

1. In my own words, the major responsibilities of this role are...

2. If I had to divide my responsibilities into a pie chart, it would look like...

3. The most valuable thing(s) I learned about being effective in my role were...

4. Obstacles to completing my position responsibilities effectively were...

5. Things that helped me better handle the responsibilities of the position were....

6. Things I wish I had known before taking this officer position were....

7. Resources which assisted me in handling my position were...

8. If I had another year in the position, my priority/vision for this role would be...

9. Go to the Department of Leadership Initiatives for...

Incoming Officer Transition Worksheet

[Complete before transition meeting discussion]

Incoming officers should complete this worksheet before meeting with the outgoing officer for their role. The worksheet is intended to help you idealize your role and generate questions about how to do your job successfully.

1. In my own words, the mission of this organization is the following:
2. Why did I want this role? What skills or experiences do I want to gain?
3. What position-specific things do I need to know about (e.g., forms, meetings, reports, events, bank account, timeline, duties, etc.)? Generate a list to discuss with the outgoing officer.
4. List tasks you think you should do in the next month. Ask the outgoing officer if there is anything to add.
5. Write down a tentative timeline for your upcoming tasks. Ask the outgoing officer: What should be done before the semester ends, during the break, and at the beginning of the new semester?
6. Generate a list of people you think you should get to know that may serve as helpful resources. Ask the outgoing officer if there is anyone else to add.
7. Brainstorm a list of resources to use in completing the duties of your role (e.g., websites, offices, etc.). Ask the outgoing officer if there is anything to add.
8. What expectations do I have of myself in this position? Ask the outgoing officer if these seem reasonable or if something should be added or reconsidered.
9. What expectations do I have of the rest of the executive board? Ask the outgoing officer if these seem reasonable or if something should be added or reconsidered.

10. What expectations do you believe others have of you in your role? Ask the outgoing officer if they have anything to add.

11. What is my self-care plan?

12. Other questions I want answered...

Student Organization Officer Transition Meeting Outline

Introduction: Before the new officers of your organization officially assume their responsibilities, it is wise for the outgoing and incoming officers to get together for a transition meeting. In this meeting, the incoming 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 current year.

Instructions: This meeting must be facilitated by the executive board officers and it is helpful if advisor(s) are present. Immediately after the election or appointment of the executive board officers, it is highly recommended that both the outgoing officers and/or advisor help plan the agenda. The following outline can help you make your transition meeting flow as smoothly as possible:

I. *Welcome and Introductions*

- A. Help participants get acquainted and explain the purpose of the meeting
- B. Activity to help everyone get in the proper mindset for transitioning
 - Potential activity: Each person could share their pits and peaks relating to the organization for the past year. This will help participants reflect on the organization's strengths and areas for growth.

II. *Mission, Vision, Values*

- A. Reiterate the "Why" of your organization

III. *State of the Organization Report*

- A. Outgoing officers should be prepared to report successes, challenges, and the current climate of the organization
- B. Completing a SWOT (strengths, weaknesses, opportunities, threats) analysis could be useful
- C. Other questions for consideration
 - **Goals:** 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?
 - **Programs and Activities:** Evaluate what your group did. How effective were the programs / activities we coordinated? 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 there chances for members to get involved in a meaningful way?
 - **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?
 - **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? Did we have any risk management issues this year? If so, were they properly handled? How will we be proactive next year? Was the constitution followed to

- run the organization? Are there suggested and/or mandatory amendments to the constitution?
- **Advisor Involvement:** Evaluate both quality and quantity. Did our advisor meet the group's expectations (which were discussed in advance)? Did we keep our advisor informed of organization programs and activities? Did we give our advisor a chance to get involved? How could we improve advisor involvement?
- **Governing Organization** (if applicable): Evaluate compliance. Did we meet organization standards? How was the communication with the organization? What does the organization require from us?
- **Reputation:** Evaluate how other groups perceive you. How do we see ourselves? Is this how "outsiders" see us? How can we enhance our reputation?

IV. *Organization Accounts and Digital Sites*

- Share all organization passwords and sites used
- Ensure financial records and banking information are shared, including the EIN for the organization
- OrgLINK: Provide training on how to update the roster, create an event, locate forms, etc.

V. *Organization Timeline*

- Cover the typical life-cycle or timeline of your student organization
- Review the Important dates to maintain recognition by SHSU
- Discuss to-dos for each semester

VI. *Outgoing and New Officer Transition (at least 30 minutes)*

Have the new and outgoing officers meet individually to discuss their worksheets and the following:

- 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

VII. *Outgoing Officer Farewell*

- Outgoing Officers leave meeting

VIII. *New Officer Team Beginning* (hold a meeting directly after the transition or plan one for an upcoming date)

- Engage in the first executive team meeting
- Consider the following agenda items:
 - Duties/tasks
 - Determine who will take care of recognition requirements
 - Set times/dates for upcoming meetings, book rooms, etc.
 - Sign up for any Organization Fairs or events that are coming up
 - Goal Setting (see New Officer Group Worksheet)

IX. *Adjourn the meeting*

New Officer Group Worksheet – Goal Setting

New officers can use this worksheet to help the group achieve a sense of common purpose and to set goals.

1. How would we describe your organization to someone who is unfamiliar with it?

2. What is the mission of our organization?

3. What is our vision for the organization? Vision is what the organization aspires to be in the future.

4. How does our organization execute our mission and vision? What philosophies, activities, or events does our organization host? Do they all align with our organization's purpose?

5. Do we think organization members would be able to articulate the organization's mission? If no, how can we communicate the mission?

6. How is our organization structured? Does the officer, committee, and informal role structure equitably distribute labor?

7. How are our organization's meetings structured? Do members engage?

8. Besides meetings, what kinds of activities does our organization host? Do most members attend? Do only a subset attend? If just a subset, what does that group have in common?

9. Use the chart to set SMARTIE goals for the upcoming year.

SMARTIE Description	Goal 1	Goal 2
Specific <ul style="list-style-type: none"> • What do we want to accomplish? • What are the requirements and constraints? 		
Measurable <ul style="list-style-type: none"> • How will we measure progress? • How will we know when the goal is accomplished? 		
Achievable <ul style="list-style-type: none"> • How can the goal be accomplished? • What logical steps can we take? 		
Relevant <ul style="list-style-type: none"> • Is this a worthwhile goal? • What resources do we need to obtain? 		
Timely <ul style="list-style-type: none"> • How long will it take? • When are we going to work on this goal? • What is our deadline? 		
Inclusive <ul style="list-style-type: none"> • Does our process bring traditionally marginalized folks into the process, activities, and decision-making roles? 		
Equitable <ul style="list-style-type: none"> • Does our process include elements of fairness or justice that seek to create equitable opportunities for all 		

Officer Operations Records

Officer Operations Records are a beneficial resource in orienting the new officers with all the functions and responsibilities of their position. The Records (hard copy and/or electronic) should cover all aspects of officer responsibilities and how those tasks fit into the organization's operations. If Officer Operations Records are not currently done, incoming officers must initiate development and use of Operations Records at the beginning of the position's term of office. The Records must be utilized by officers as a working tool throughout the year rather than something to be completed at the end of the year.

Should Include:

Organizational Mission and/or Vision Statement and/or Core Values
Organizational Constitution and By-Laws
Organizational Policies and Procedures (*Including Risk Management policies*)

National Governing Organization Constitution, By-Laws, and/or Charter
University Mission Statement
University Policies and Student Guidelines

Historical Information (i.e. rituals, traditions, significant changes with reasons, milestones)
Organizational Chart
Officer Position Job Descriptions and Responsibilities
Budget and Financial Guidelines – including banking information and EIN
Recognized Student Organization Services Available from Leadership Initiatives

Current Organizational Goals
Specific Officer/Position Goals
Officer Specific Task Timeline in Chronological Order by Month
Important Forms
Important Resources, Passwords, and Service Numbers Contact List

Calendar of Events
Agendas and Meeting Minutes
Committee Reports
Program/Event Planning Documents and Evaluations
Year-End Reports and Evaluations

Pertinent Correspondence
Unfinished Project Information
Name and Contact Information of Outgoing Officers