

*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*



# OUTGOING OFFICER GUIDE

## 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*  
Help participants get acquainted and explain the purpose of the meeting
  
- II. *The Year in Review (at least 45 minutes)*
  - A. **Goals:** Review the group's goals for the current 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 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?
  
  - 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 there 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?  
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?

- F. **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?
- G. **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?
- H. **Reputation:** Evaluate how other groups perceive you.  
How do we see ourselves? Is this how "outsiders" see us?  
How can we enhance our reputation?

III. *Your Legacy to the New Officer Team (no more than 15 minutes)*

- 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 the major challenges and accomplishments in your term?

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

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. *Adjournment & Wrap-Up (no more than 15 minutes)*

- A. **Suggestions:** Provide an opportunity for final questions or comments  
Provide an opportunity for informal socializing.
- B. **Highly Recommended:** *New officers conduct a short meeting to debrief transition meeting, discuss immediate requirements prior to end of semester, identify things to accomplish during break and early semester, and collect contact information.*

## **Officer Operations Binder**

The officer operations binder is a beneficial resource in orienting the new officers with all the functions and responsibilities of their position. The binder should cover all aspects of officer responsibilities and how those tasks fit into the organization's operations. If officer operations binders are not currently done, incoming officers must initiate development and use of operations binders at the beginning of the position's term of office. The binder 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  
Registered Student Organization Services Available from Campus Activities & Leadership Initiatives

Current Organizational Goals  
Specific Officer/Position Goals  
Officer Specific Task Timeline in Chronological Order by Month  
Important Forms  
Important Resources and Services 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

## Outgoing Officer To-Do List

- Gather and organize all documents and files
- Finish all necessary correspondence (letters, e-mail, phone calls)
- Prepare year-end report and evaluation
- Review the organization's constitution, by-laws, written material, and other documents needing revision.
- Develop training action plan and timeline for new officer transition, including but not limited to:
  - Necessary meetings attended and conducted by officer
  - Important tasks
  - Sharing tasks and duties with other officers and/or members
  - Introductions to key individuals
  - Required meetings and trainings workshops
  - Financial Information
    - Insure banking information, EIN #'s and records are passed down
- Complete outgoing officer transition sheet – Enclosed
- Prepare updated Officer Operations Binder/Manual
- Have new officers update information on OrgLINK (<https://shsu.collegiatelink.net/>)



## **Outgoing Officer Transition Worksheet**

*[To be completed before transition meeting]*

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

What I liked best about my position...

What I liked least about my position...

What I wish I had done, but did not was...

To make my experience better, I could have...

Obstacles to performing my position effectively were...

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

Things I wish I'd known before I took the position were...

## **Incoming Officer Transition Worksheet**

*[Questions to ask during transition]*

What should be done before the semester ends, during the break, and at the beginning of the new semester?

Faculty, staff, and student organization officers that I should get to know...

Campus and off-campus services and resources I need to know about...

Things I need to know about working with other officers, the chief student leader, and/or advisor...

Other questions I want answered...