

STUDENT ORGANIZATION OFFICER TRANSITION GUIDE



TRANSITION:

An extraordinary, opportunity to invest in your organization's success, reflect on your individual leadership style and develop a plan to strengthen your coalition-building and influencing skills. It is a time to learn how to use power constructively, a chance to examine the best practices for managing change, and a space to learn about the systemic factors in your organization's environment, and in your own behavior, that can influence your plans.

-Insead Business School for the World

Adapted from the Villanova University and George Washing University guides

Introduction:

Too often, organization leaders dedicate themselves to successfully leading their groups for an academic year and at the end of their terms, leave the positions without time spent making sure the incoming officers have the opportunity to be trained. When that happens, 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:

- o Outgoing Officer/Executive Board Transition
- o New Board Transition/Future Goal Setting

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.

OUTGOING OFFICER GUIDE

Outgoing Officer To Do List

In addition to gathering information for the new board members, the outgoing officer should tie up any loose ends in their position. This is a suggestion of to do items to ensure all necessary items have been completed.

1. Refer to your organization's Constitution and Bylaws. After selection, update your Groups Callink.berkeley.edu roster by having new officers join the roster via the "Join Organization" button or "Invite People" features
2. Take steps to secure space is reserved for annual events. For various campus space reservation steps see <http://lead.berkeley.edu/manage-your-organization/plan-events-programs/reserve-space/>
3. Organize all notebooks and files.
4. Finish all necessary correspondence (letters, e-mail, phone calls).
5. Begin the LEAD Center Re-Registration process, see <http://lead.berkeley.edu/manage-your-organization/register-your-org/>
6. Develop an action plan and time-line for new officer transition, including but not limited to:
 - a. Necessary meetings attended and conducted by officer
 - b. Important tasks
 - c. Sharing tasks and duties with other group members
 - d. Introductions to key people / Relationship building
 - e. One on one meetings and training
 - f. Financial Information
 - g. Leadership training
7. Complete Outgoing officer information sheet(s) – part of this packet.
8. Schedule a joint retreat between outgoing and incoming officer for additional information that may be directly related to your organization.
9. Make sure all contracts, bills, and invoices have been accounted for. If any are in process at the time of transition, write a memo to the new officer noting what is complete/what needs to be done with them.
10. Allow incoming officers to shadow outgoing officers.
11. Create/update an officer transition binder (see next page for suggested list of what to include), upload important documents to your Callink Org Documents folder, and share any documents with the new board members that were not included in the transition binder/officer handbook.

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:

Student Org Specific Groups Files to be uploaded to Callink Documents Folder

- o Organizational Mission Statement
- o Organizational Constitution and By-Laws
- o Organizational Policies and Procedures
- o Student leader job descriptions
- o Year-end reports and evaluations
- o Organizational Calendar
- o Budget Information
- o Organizational Goals
- o Agendas and Meetings Minutes
- o Committee Reports

Items Related to the University:

- o Student Organization Signatory policies and instructions
- o ASUC Sponsorship or GA Funding status
- o Campus Department Affiliation contact, if any

Additional Helpful Resources:

- o Important names and numbers (contact list)
- o Pertinent correspondence
- o Resource list
- o Important forms
- o Organizational goals - both met and unmet
- o Name and contact information of outgoing officers
- o Unfinished project information
- o 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 information will be helpful to 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 ways of avoiding or correcting 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 / college officers, community resources, etc.

Create a timetable/list 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 be helpful to your successor in carrying out the responsibilities of this office.

EVALUATION AND ASSESSMENT

Officer / Chair Evaluation

This evaluation is to be used by the organization leader to provide constructive feedback to student group officers / chairs to alert them to areas in which they're strong and to areas in which they need to improve.

Name of Student to be Evaluated:

Period of Evaluation: _____ through _____

Evaluator: (Name) _____ (Title) _____

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

I think 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 judgment.

O V G A P NA

Is effective when 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 through 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 high quality work.

O V G A P NA

Displays a sense of professionalism.

O V G A P NA

Demonstrates overall effectiveness as an officer / chair.

O V G A P NA

This officer's / chair's strengths include:

- 1.
- 2.
- 3.

This officer's / chair's areas for improvement include:

- 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:

Outgoing Executive Board Evaluation

This document is to be used by the outgoing board 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 greatest 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 / 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 experiences of the outgoing officers. A casual, open atmosphere should be encouraged so the organization can benefit from an honest evaluation of the accomplishments and issues of the previous year. The following outline can help make the 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

Goals: Review the group's goals for the previous year.

- o What did we hope to accomplish?
- o How well did we do on each goal?
- o What goals should be continued this year?
- o What goals need to be changed?
- o What goals are no longer feasible?

Programs and Activities: Evaluate what your group did.

- o How effective were the programs / activities we sponsored? How did we measure their effectiveness?
- o Did we have a good balance in our schedule of programs and activities?
- o Were our programs and activities consistent with our goals?
- o What activities and programs do we want to repeat?

Membership: Evaluate number of members and their commitment.

- o Do we have too many, too few, or just the right amount of members?
- o What actions did we take to recruit members?
- o Were our recruitment efforts successful?
- o Are our members as actively involved as we want them to be?
- o What were the opportunities for members to get involved in a meaningful way?

Officers and Organizational Structure: Evaluate officers and structure.

- o Are officer roles and responsibilities clearly described? How?
- o Did officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
- o Is the time and effort required in each position comparable?

- o Is there two-way communication between officers and members?
- o How do the members feel about the officers?

Organizational Operations: Evaluate finances, communication, etc.

- o Were the finances adequate for our group and managed properly?
- o Were meetings run effectively? Was their frequency adequate?
- o Did the committee structure work?
- o Did we have scheduling conflicts with other groups or activities?

Advisor Involvement: Evaluate both quality and quantity.

- o Did our advisor provide the support we needed?
- o Did we give our advisors and other faculty a chance to get involved?
- o How could we improve faculty and advisor involvement?

Public Image: Evaluate how other groups perceive you.

- o How do we see ourselves? Is this how “outsiders” see us?
- o How can we enhance our image?

III. Your Legacy to the New Officer Team

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

IV. Officer Transition

(Have the new and outgoing officers meet individually to discuss)

- o Responsibilities of the position, with a job description
- o A timetable for completion of annual duties
- o Unfinished projects
- o Important contacts and resource persons
- o Mistakes that could have been avoided
- o Advice for the new officer
- o Any questions the new officer may have
- o Where the outgoing officer can be reached with future questions

V. Wrap-Up

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

INCOMING OFFICER GUIDE

Overview of Your Role as a Student Leader

Keeping these guidelines in mind will help you succeed and be respected by your peers!

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 that 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-making 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 that 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.

Incoming Officer's Transition Worksheet

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

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

Other questions I want 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 be done immediately in the fall?

Personal Goal Setting for Your Position

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 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 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?

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 specifically can I do within one month to reach all my goals?

WORKING WITH YOUR ADVISOR

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 at VU. Use his/her 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.
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 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. **Conflict Resolution Assistant:** Use your advisor as an impartial mediator.
16. **Financial Supervisor:** Use your advisor's experience with University procedures to help you stay on top of your organization's finances.
17. **Meeting Attender:** Be sure to inform your advisor of all meetings so that he/she can attend.
18. **Assistant in Evaluating the Organization:** Use your advisor as a resource to determine what you should be evaluating and when.
19. **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)

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.