

# **Student Organization Officer Transition Guide**

Dear Student Organization Leader:

Too often, the Department of Student Involvement 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 can be trained.

When no transition occurs, all the information regarding the

## 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

### **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**

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

**August**

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 c c co traimt10

# 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...  
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9. Go to the Department of Student Involvement 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





# 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:

- 1) 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
    - i) **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.
- 2) Mission, Vision, Values
  - a) Reiterate the "Why" of your organization
- 3) 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
    - i) **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?
    - ii) **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?
    - iii) **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?



## 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

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

SMARTIE Descriptive



## Resources

### [OrgLINK](https://www.shsu.edu/orglink)

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### [SHSU Student Organization Policy](https://www.shsu.edu/dept/student-involvement/forms/StudentOrganization%20Policy.pdf)

<https://www.shsu.edu/dept/student-involvement/forms/StudentOrganization%20Policy.pdf>

### [SHSU Student Code of Conduct](https://www.shsu.edu/dept/dean-of-students/student-code-of-conduct.html)

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