



# Officer Transition Guide

# Outgoing Officer Guide

Okay, you have a successor for your position within your student organization. What do you do now?

Before you can transition the incoming officers, creating a “Year in Review” file might be helpful for you and other officers to find closure. Set up a meeting to recap the year as an executive board.

## **The Year in Review**

- a. Goals: Review goals that you had set to accomplish; review accomplishments, what worked, what didn't, what needs to be kept consistent, what needs to be changed?
- b. Strengths and Weaknesses: Evaluate your executive board and organizations. Be honest, it will only help your organization grow.
- c. Programs and Activities: Evaluate programs and activities. Be honest. What worked, what didn't, and the shoulda/woulda/couldas of your organization.
- d. Membership: Evaluate recruitment of members, commitment to the organization, etc.
- e. Advisor Involvement: If you advisor wasn't involved, how would you like to see that change?
- f. Complete Outgoing Officer Worksheet

## **After completing your “Year in Review” what happens now?**

1. Set up an individual meeting to help transition the incoming officer (your direct successor)
2. Create a transition retreat to help bring new officers together.
3. Utilize your advisor to facilitate transitions and training.

# **Outgoing Officer Worksheet**

**Complete BEFORE transition meetings and training sessions!**

Think about and respond to the following questions:

1. What I liked best about my job...
2. What I liked least about my job...
3. What I could have done better to make the experience better was...
4. Obstacles to performing my job effectively were...
5. Resources which helped my handle my position were...
6. Things I wish I'd known before I took the job were...

# Officers in Training

Create a 3 ring binder...

All group members should have a constitution, a contact list of all members, and a projected annual schedule

## **President:**

- Constitution/By-Laws
- All officers/job descriptions
- Budget Information
- Contact information
- Advisor, community contacts, etc.
- Copy of group history

## **Vice President:**

- Constitution/By-Laws
- Same materials as president
- Record everything position is responsible for (varies from group to group)

## **Secretary:**

- Constitution/By-Laws
- Contact sheet for members
- Alumni contact info
- Past minutes
- Paperwork related to position

## **Treasurer:**

- Constitution/By-Laws
- Budget information
- Bank information
- Budget history
- Advisor contact information
- Allocation and Fundraising information

## **Various:**

- Constitution/By-Laws
- Copy of budget
- Job descriptions
- "Ideas" folder for position
- Event resources
- Relevant position information

# Incoming Officer Guide

## Your Role as a Student Leader

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 and changes to 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 through working through problems rather than the final result.** Your desired results may change as your group changes. An open channel of communication which 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 decisions 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 a criticism as a chance to solicit suggestions for improvement.
10. **Share the glory.** You cannot expect enthusiastic participation of you take all the credit.
11. **Have faith and confidence in the ability of the 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 which 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 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 Worksheet**

**Complete BEFORE meeting with your predecessor!**

Think about and respond to the following questions:

1. The specific things I want to know about in my position are...
2. Processes/information I need to know about are...
3. Things I can do over summer are...
4. Things I should know about working with my advisor are...
5. Other questions I want answered...

## Incoming Officers – “Goals, Dreams, and Priorities”

Things we would like to Accomplish				
Barriers/Limitations				
Resources				
Unknown Questions				
Why We Want This				

# Goal Setting Guide

## 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 member participate in meetings, having more interesting meetings, etc.)
  - A.
  
  
  
  
  
  
  
  
  
  
  - B.
  
  
  
  
  
  
  
  
  
  
  - C.

## Where can I begin?

- Which goals seem important to me?
  
  
  
  
  
  
  
  
  
  
- Do I have the skills necessary to accomplish my goal? Who else in my organization can help me? Are there outside resource people who might help?
  
  
  
  
  
  
  
  
  
  
- What can I accomplish next week?
  
  
  
  
  
  
  
  
  
  
- What specifically can I do within one month to reach all my goals?



# Working with your Advisor

## As viewed by the advisor:

- Resource person
- Friend/Counselor
- Pick up the pieces when necessary
- Assist in planning
- Play devil's advocate
- Help set goals
- Help maintain direction and provide continuity
- Stimulate creativity and motivation
- Serve as sounding board for students
- Facilitator for group process
- Be accessible

## As view by Student Leaders:

- Resource person
- Positive reinforcement and support
- Constructive criticism
- Serve as liaison between organization and university
- Deal with legal and contractual matters
- Attend committee meetings
- Advise on specific university procedures
- Be available
- Discuss ideas, but don't dictate
- Support events by attending
- Play devil's advocate when needed
- Brainstorming
- Realize leaders are volunteers

## Advisee/Advisor Relationships

1. The responsibility for building the relationship must be shared between advisor and student. View 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 others various roles and responsibilities in/outside of their activities position. Know each other commitments and let each other know their impact.
4. Both advisor/student are human beings who make mistakes, follow their own values 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.

# The Role of your Advisor

All Sport Clubs are required to have a current faculty/staff advisor. They shall be very helpful and active within the club. Sport Clubs shall rely on them for assistance with activity planning, fund-raising, budget preparation, and problems with club members.

The advisor position for a sport club is unique and essential to the success of the club. Each advisor provides interpretations of university guidelines, aid in the development of student leaders and professional leadership to compliment the Sport Club administrators. Advisors are selected from the Lamar University staff to act as club advisor.

He/she shall serve as a resource person regarding University matters and help club members manage club business and balance club/school activities. The club advisor should participate and offer guidance. His/her role should be to provide advice to the club. The advisor is most helpful when he/she uses his/her mature judgments and experience to help club members refine their programs and discussions to a point where they are effective, realistic, and reflect favorably on the University.

***The faculty/staff advisor is considered a valuable link between the Club and the University. The advisor for a Club:***

- Is selected by the members of the club.
- Should be an individual who is accepted and respected by the members of the club.
- Must be a current faculty or staff member of the Lamar University.
- Should be available during the development of programs and attend club meetings on a regular basis.

***Responsibilities of the advisor are:***

- To work closely with the club and its officers without assuming leadership of the club, recognizing the right of students to control the direction of their club.
- To assist the club and its officers in maintaining club continuity by providing information and interpretations of university policies and procedures.
- To be available as a resource for the club and its leaders.
- To keep in mind that the primary responsibility in this position is to provide information and referral so that club members develop leadership potentials.

# Motivation

## Keeping your officers and organization members motivated throughout the year

### Ten Commandments for Student Leaders

1. Look upon all of it as a learning experience.
2. Mistakes are inevitable. You have to learn to live with them, and so do others.
3. Don't get caught up with global issues, such as remaking the whole university and outgunning the trustees. Politics is the area of possible; so pick out some realistic goals and really go for them.
4. Try to strike up a friendship with the administration. They aren't really bad guys and you have something to learn from them. Also, they are not automatic adversaries. Believe it or not, they like you and want to be as helpful as you mature into real leaders.
5. The common good is terribly important. It means the common good for students, faculty, and for the whole university community. You are part of it, so work for it.
6. Be honest, especially with yourselves. Integrity is probably the best quality of a leader.
7. Be open minded. No other attitude makes learning possible. As Winston Churchill said, "All complicated questions have simple answers. However, they are all wrong."
8. Be fair, even with grownups. Fairness will win them more than anything else.
9. Don't be cynical. A cynic accomplishes nothing. All of us have to be shocked by the injustices we face in life. Cynicism will never conquer them and attain justice.
10. It is important to be able to laugh at ourselves which means not to take ourselves too seriously, whether we are President or freshman. Somehow laughter gets us through the most difficult of solutions.

# How to Make an Impact as a Student Leader

1. Be a role model
2. Confront unacceptable behavior
3. Utilize training experiences
4. Find the “teachable moment”
5. Be supportive of others
6. Actions should reflect words – be consistent
7. Develop expectations
8. Present programs that are reflective of your value and organizational values
9. Be consistent in your organizations promotions and advertisements
10. Structure experiences
11. Lead discussion sessions on values and ethics
12. Develop and organizational and/or personal code of ethics
13. Make a difference in all that you do!