



STUDENT ORGANIZATION OFFICER TRANSITION GUIDE

What are Officer Transitions?

Officer transitions are the time that the previous officer class trains the incoming officer class newly elected officer class on the processes of their organization and ensuring that they are ready for leading an organization. Without transitions we lack structure and organizations struggle to exist.

Why are Officer Transitions Important?

- Transfer ownership of files / bank accounts.
- The incoming officer is aware of previous actions of the previous officer.
- Seamless continuation of organization goals.
- Maintains organizational structure year by year.

What is the Training Process?

1. Outgoing officer finishes "Outgoing officer checklist" and "Outgoing officer Worksheet"
2. Incoming officer finishes "Incoming Officer Worksheet"
3. Both officers meet in person, sample transition meeting agenda below
4. Outgoing officer provides contact information in case issues arise

How do we make proper goals?

Making proper goals is an important part of Training, for this we remember the SMART format. This makes sure our goals can be met during the academic year! We need to make sure we revisit them often and make sure we fulfill them through the year.

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Outgoing officer Checklist (PRESIDENT)

Documentation	People	Tasks
<ul style="list-style-type: none"> <input type="checkbox"/> Collect all organization paperwork (Google drive, SharePoint, etc.) <input type="checkbox"/> Locate a copy of your organization's Constitution / By-laws to provide to incoming officers <input type="checkbox"/> Make an asset list of your organization of your current supplies and where to find them. <input type="checkbox"/> Collect login information (Social media accounts, general mail accounts, calendar) <input type="checkbox"/> Collect SOFAC Information to provide to incoming officer (Budget, guidelines, how to pay, Organization M#) 	<ul style="list-style-type: none"> <input type="checkbox"/> Introduce officers to important organization contacts (Advisor, Organizations, Financials) <input type="checkbox"/> Create a list of all organization contacts (Missouri State, outside organizations, etc.) <input type="checkbox"/> <u>Update Bear Link page to properly reflect the new president (Roster AND Publicly facing information)</u> 	<ul style="list-style-type: none"> <input type="checkbox"/> Finish all correspondence <input type="checkbox"/> Properly list the new officer team on the bear link roster <input type="checkbox"/> Send new executive board to Event Meeting Services for EMS Portal Access <input type="checkbox"/> Prepare a State of the Organization report for incoming officers (See sample meeting agenda (9) for topics) <input type="checkbox"/> Collect and share dates of meetings the new officer will need to attend (Re-Registration, SOFAC)

Any Additional Tasks:

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Outgoing officer Checklist (TREASURER)

<p>Documentation</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide access to the organization's bank account. Ensure the bank is updated to reflect the change. <input type="checkbox"/> Provide prepared budget for previous semesters, first budget for next semester will be worked on together. <input type="checkbox"/> Provide access to any other accounts required. 	<p>Tasks</p> <ul style="list-style-type: none"> <input type="checkbox"/> Ensure all documents are stored in a single spot. <input type="checkbox"/> Introduce officer to contacts as needed.
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Outgoing Officer Checklist (General)

<p>Documentation</p> <ul style="list-style-type: none"> <input type="checkbox"/> Collect all documentation (event plans, budgets) <input type="checkbox"/> Prepare a sample calendar for the coming semester to go over with officer to set them for success. <input type="checkbox"/> Prepare a list of needed supplies for events and previous costs. <input type="checkbox"/> Prepare a State of the Organization report for the incoming officer. 	<p>Events</p> <ul style="list-style-type: none"> <input type="checkbox"/> Collect information (proposals, budgets) for annual meetings. <input type="checkbox"/> Go over how to reserve rooms with the Event Meeting Services portal. (if required) <input type="checkbox"/> Collect any event-specific SOFAC information needed. 	<p>People</p> <ul style="list-style-type: none"> <input type="checkbox"/> Introduce to important organization contacts. <input type="checkbox"/> Provide a list of contacts to the outgoing officer. <input type="checkbox"/> Ensure they have the proper position on Bear Link and previous officer is removed.
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Incoming Officer Worksheet

Name: _____

Position: _____

Date: _____

1. What are your goals for this position? What do you hope to achieve as an officer? (SMART GOALS)

Specific (What)	Goal 1 – Goal 2 -
Measurable Can we see results?	Goal 1 – YES / NO Goal 2 - YES / NO
Achievable Can we actually do this?	Goal 1 – YES / NO Goal 2 - YES / NO
Relevant Align with our mission?	Goal 1 – YES / NO Goal 2 - YES / NO
Time Bound Time this needs to be done	Goal 1 – Goal 2 -

2. Why did I choose to run for this position?

3. Is there anything specific I need to know from the outgoing officer?

Outgoing Officer Worksheet

Name: _____

Position: _____

Date: _____

1. What were your goals for the position for the year, were they met? If not what happened?

GOAL 1	GOAL 2

2. What do you believe the goals of this organization is?
3. What was accomplished during this term? (Big events, changes to organizational structure, meetings with OSE)
4. Was there any issues with the executive board this year? (this is a great way to find ways for the next officer team to improve on the past year.)

5. What is the best advice you would give to your incoming officer?

6. Is there anything that you think “I would I would have known x” before coming an officer? If so what was it?

7. If the new officer needs assistance, I recommend going to (Advisor, OSE Involvement Ambassador, etc)

I, _____, have completed any and all necessary tasks to fulfill my executive position of _____ (Position title), and have completed the transition training for the incoming officer.

Outgoing Officer Signature

Date

Return this form to your organization’s president for filing.

Sample Transition Meeting Agenda

Pre-Meeting Preparation

1. Arrange room so one facilitator (previous president) can speak to whole new and old officer team.
2. When seating put old officer next to the new officer (left new right old)
3. Ensure you have a spot to present a computer to a screen.
 - a. This helps to have the old and new officer have a meeting during this transition.

During the meeting

1. Introduction Icebreaker – Make sure everyone knows each other in the room!
 - a. The classic around the room with names and a favorite (x)
 - b. Talk about the highs and low of the organization this year!
2. State of the Organization Report
 - a. All outgoing officers will participate in this, stating their position and how things are going with their position.
 - b. Topics can include:
 - i. Goals
 1. What goals did we set for the year; did we meet those goals? If not, what could we have done to achieve them?
 2. What goals should be extended to the next term?
 3. Any changes to the goals we have
 4. Are there any goals we can no longer achieve?
 - ii. Programs and activities
 1. Any major events this year? How did they go?
 2. Are there any ideas for events that weren't completed?
 3. Was there a good balance in the schedule?
 4. What activities should be repeated?
 - iii. Membership
 1. How many new members were gained this year?
 2. Did we lose a lot of membership? What happened?
 3. What actions were taken for recruitment?
 4. Is involvement in the organization an issue? Do we have a current incentive?
 - iv. Officers and Organizational Structure
 1. Are our roles clearly described? Did anyone have to do items that weren't in writing?
 2. How is our communication structure?
 3. How do members feel about the officers?
 - v. Organizational Operations
 1. How are finances?

2. Were there any major constitution amendments?
 3. Were committees effective?
 3. Next semester Calendar
 - a. The previous officer has filled out a sample calendar for the incoming officer to base events off of. Go over this calendar with your organization as a group, establish to-dos!
 4. Organization Account Access
 - a. Previous officers work with incoming officers to provide login information.
 5. SOFAC What is it?
 - a. Funding for an organization can be difficult, take this time to go over the Student Organization Funding Allocation council. Go through the website at <https://organizations.missouristate.edu/SOFAC/default.htm>
 - b. Does the organization currently have SOFAC funding? If so how much?
 6. 30 – 60-minute breakout session with the previous officer
 - a. Topics can include.
 - i. Position specific documents
 - ii. Going over the incoming and outgoing officer sheets
 - iii. answering questions about the position and making plans
 7. Farewell to previous officers.
 - a. Previous officers can leave at this point, leaving the new officers to lead their first executive meeting.
 8. Topics for first executive meeting
 - a. Create Goals for the organization as a board.
 - b. Create board meeting times and reserve the space.
 - c. Create meeting times for next semester and reserve the space.
 - d. Specific event plans or ideas that could be added to the calendar.