DEPAUL STUDENT ORGANIZATION
OFFICER TRANSITION MANUAL

STUDENT ORGANIZATION OFFICER TRANSITION MANUAL

A LETTER FROM OFFICE OF STUDENT INVOLVEMENT

Dear Student Organization Leader:

The Office of Student Involvement has had the fortune of working with you and your peers in leadership positions throughout the years. We have seen your organization start up, grow, and experience transition, whether that be due to changes in leadership or other organizational hardships. We in OSI strive to Make Good Things Happen, and help students contribute to the DePaul Community.

One of the ways OSI staff can do the best work with you and your organization is effectively using the time we have with you and your team. Through coordinated and thorough transition, your organization reduces the time spent re-learning the basics at the beginning of each new term. Transition allows outgoing officer efforts and lessons learned to be passed onto incoming officers and quickly creates a stable foundation for the work new officers hope to accomplish.

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. "*
> *8 Tips for Effective Student Leader Transition", Campus Activities Programming, May 2009.*

This guide offers a variety of helpful resources to equip your organization with the right tools to help transition outgoing and incoming officers. Use these steps as a way to empower yourself and your incoming officers to hold intentional conversations with one another. Through transition, you will minimize the effects of turnover within your organizations, increase the organizations' success, and continue momentum accomplished by your peers during the previous year.

The Student Organization Officer Transition Guide is designed to be used in sections:

• Outgoing Officer/Executive Board Transition

• New Board Transition/Future Goal Setting

The tools in this packet are meant to be used individually, or together as a whole guide. You are encouraged to take what you need to tailor the transition experience.

Please contact our office via email at studentorgs@depaul.edu for any further questions or help.

Sincerely,

The Office of Student Involvement

CAMPUS RESOURCES
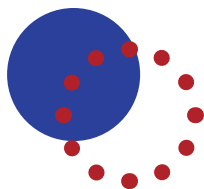
OFFICE OF STUDENT INVOLVEMENT

The Office of Student Involvement fosters learning and success by providing opportunities for engagement through a wide variety of campus activities and organizations, holistic and intentional advising of student leaders, and the development of purposeful and mutually beneficial partnerships across the university and the City of Chicago to maximize access to resources for a rich DePaul campus experience.

Office of Student Involvement
2250 N Sheffield Ave (LPSC)
Chicago IL 60614 Suite 201
(773) 325-7361
studentorgs@depaul.edu

Office Hours
Monday-Thursday: 9am-10pm
Friday: 9am-5pm
Saturday: Closed
Sunday: 3pm-7pm

Virtual Office:
https://depaul.zoom.us/j/554258767

The Office of Involvement offers a variety of rental and support services on DeHub.

Social Media Marketing Request
Publicize upcoming events on the Office of Student Involvement Instagram stories and/or OSI TV screens.

Mailbox Request (Lincoln Park)
Student Organization Mailboxes available in the Office of Student Involvement Office.

Student Involvement Conference Room
Reserve the Student Involvement Conference Room for your organization meetings.
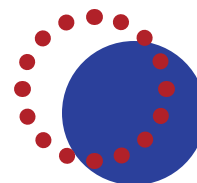
Pepsi Product Request
Place requests for free Pepsi Products for your organizational events.

OSI Resource Request
Place request for resource rentals: Interactive Games, Giant Games, Electronics, and Food/Drink Supplies.

Promotional Table Request
Place a request for a tabling spot on the first floor of the Student Center.

LINCOLN PARK STUDENT CENTER

The Student Center building in Lincoln Park offers a wide range of meeting spaces, with audiovisual and catering options LPSC has rooms available on three floors in addition to Munroe Hall, the Quad, or Cortelyou Commons. The Loop campus has three audio-enhanced rooms on the 11th floor of DePaul Center.
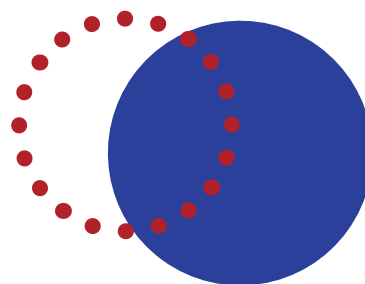
Lincoln Park Student Center
2250 N. Sheffield Suite 303
Chicago, IL 60614
studentcenters@depaul.edu
(773) 325-7346

Loop Conference Services
1 E. Jackson Blvd.
Chicago, IL 60604
confservices@depaul.edu
(312) 362-8624

Lincoln Park Reservable Classrooms
Lincoln Park Student Centers
Loop Reservable Classrooms
Loop Student Centers – Conference Services

FUNDING RESOURCES

Registered Student Organizations that have had their President and Treasurer attend funding training are eligible for funding requests to help offset financial expenses to enhance the student experience at DePaul. Organizations must be in good standing with the Office of Student Involvement to receive funding.

Student Activity Fee is the major funding source for Student Organizations. Student Organizations may apply for funding requests from the Student Activity Fee.

Cultural Allocation Funding is an additional source of funding provided to only cultural and identity based organizations.

Student Activity Fee Board
More information on SAF-B here.
involvement@depaul.edu

Cultural Activity Funding Board
More information on CAF-B here.
involvement@depaul.edu

Payment Processing
Franco Sambataro
Coordinator for Student Involvement
involvement@depaul.edu
(773) 325-7361

OUTGOING OFFICER'S GUIDE

Outgoing Officer To Do List

Any Outgoing Officer should tie up loose ends of their projects in addition to compile lists of items/tasks still in progress. The Office of Student Involvement offers a non-comprehensive list of items an Outgoing Officer should consider.

1. Send a list of new officers to the Organization Advisor and OSI Staff.
   • Introduce new officers to your Advisor and staff in our office.

2. Upload the most recently updated organization Constitution and Bylaws to DeHub.

3. Secure space for annual events
   • Walk new officers through the room reservation process and timeline.

4. Identify and organize documents and files that inform your role.
   • Plan to explain newly created or updated documents, events or processes in Transition Binder. See below for a transition binder example.

5. Finish all necessary correspondence (letters, e-mail, phone calls).
   • Compile list of common/frequent contacts and purpose.

6. Begin the DeHub Re-Registration process (May 1st - Spring Quarter)
   • Add newly selected officers to your group's DeHub page.

7. Develop an action plan and time-line for new officer transitions.
   • Schedule time to review funding training deadlines, important roles and meetings, and

8. Complete Outgoing officer information sheet(s) – part of this packet.

9. Schedule a transition retreat between outgoing and incoming officers

10. Make sure all contracts, bills, and invoices have been accounted for prior to transition.
    • Provide memo for frequently used contacts or vendors.

11. Allow incoming officers to shadow outgoing officers (time permitting).

PREPARING FILES/BINDERS

"(Your Organization) New Officer Transition Binder"

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

Student Org Specific Groups Files to be uploaded to DeHub Group Page

Print a physical copy when possible

Organization Documents

Organization Mission Statement

Constitution and By-Laws
- Most Up-To Date Version

Organization Policies / Procedures

Student Leader Role Descriptions
- Executive Board Purpose and Roles
- Officer-Specific
- General Member Roles

Organizational Calendar
- Major/Annual Events
- End-of-Year Ceremonies
- Senior Send-Off
- Leadership Awards Ceremony
- Provide Planning Timelines

Budget and Funding Information
- Timeline for Funding Training
- Past & Proposed Budget
- Fundraising
- Receipts/Invoices

Meeting Agenda Template

Membership/Recruitment
- Information
- Timeline

Additional Helpful Resources:

Contact List
- Officers (Old and New)
- Advisors
- Campus Partners

Resource Lists
- Frequently Used Vendors
- OSI Frequently Used Items

Event Information
- Funding / Budget per Event
- Student Centers Information
- Chartwells Catering Form
- Room Request / Layout Templates
- Vendors
- Samples of Advertisement
- Event Evaluations

Organizational Goals (Met and Unmet)
- View Major Task Report

Do's & Don'ts
- Helpful Tips
- Lessons Learned

Password and Account Log-Ins
- Social Media
- Officer Emails
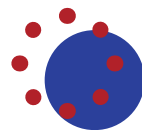
OUTGOING OFFICER WORKSHEET

(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.

OUTGOING OFFICER MAJOR TASK REPORT

Completed Task	Barriers or Limitations	Resources	Solutions	Remaining To-Do's

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 roles and tasks

O   V   G   A   P   N A

Has the ability to obtain and analyze facts and apply sound judgment

O   V   G   A   P   N A

Is effective when organizing their work

O   V   G   A   P   N A

Displays enthusiasm about their roles and tasks

O   V   G   A   P   N A

Shows a willingness and initiative in tasks needed by organization

O   V   G   A   P   N A

Communicates well with peers and staff

O   V   G   A   P   N A

Provides creative ideas and valuable suggestions

O   V   G   A   P   N A

Follows through on assigned responsibilities

O   V   G   A   P   N A

Punctual with responsibilities (i.e., meetings, deadlines, communication, etc)

O V G A P N A

Motivates peers to work effectively

O V G A P N A

Models good example of leadership for others

O V G A P N A

Is objective in decision making

O V G A P N A

Produces high quality work

O V G A P N A

Demonstrates overall effectiveness as an officer / chair

O V G A P N A

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 or Notes:

Adapted from: Old Dominion University's Organization Transition Guide (2008-2009)

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:

1.

2.

3.

Three goals we would like our successors to achieve / build on:

1.

2.

3.

DEPAUL UNIVERSITY
DIVISION OF STUDENT AFFAIRS
Office of Student Involvement

OFFICER TRANSITION MEETING OUTLINE

Outgoing officers have lived and dedicated a term of knowledge and experience for their Organization. By hosting a Transition Meeting, Outgoing Officers create a space for shared knowledge and organizational growth through learning from your time with your organization. Create a casual, open environment to hold an honest evaluation of the accomplishments and issues of the previous year. Use the following outline to help you run a smooth meeting.

I. Welcome and Introductions
- Facilitate introductions
- Provide purpose of meeting

II. The Year in Review

Goals: Review the group's goals for the previous year.
- What did we hope to accomplish?|
- How well did we do on each goal?
- What goals should be continued this year?
- What goals need to be changed?
- What goals are no longer feasible?

Programs and Activities: Evaluate what your group did
- How effective were the programs/activities we sponsored?
- How did we measure program effectiveness?
- Did we have a good balance in our schedule of programs and activities?
- Were our programs and activities consistent with our goals?
- What activities and programs do we want to continue?

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

Officers and Organizational Structure: Evaluate officers and structure
- Are officer roles and responsibilities clearly described? How?
- Did officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
- Is the time and effort required in each position comparable?
- How do the members feel about the officers?

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?

Advisor Involvement: Evaluate both quality and quantity.
- Did our advisor provide the support we needed?
- Did we give our advisors and other faculty a chance to get involved?
- How could we improve faculty and advisor involvement?

Public Image: Evaluate how other groups perceive you.
- How do we see ourselves? Is this how "outsiders" see us?
- How can we enhance our image?

III. Your Legacy to the New Officer Team

What are the current strengths and weaknesses of the group?

What is the best advice you can give your successor?

What were there major challenges and accomplishments in your term?

IV. Officer Transition

Responsibilities of the position, with a job description

A timetable for completion of annual duties

Unfinished projects

Important contacts and resource persons

Mistakes that could have been avoided

Advice for the new officer

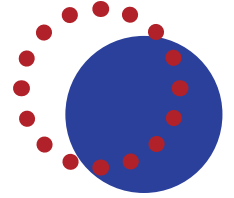Provide information on how to contact outgoing officer with future questions

V. Wrap-Up

"Pass the gavel" in a semi-official ceremony

Provide an opportunity for informal socializing

Adapted from: The Wichita State University Student Organizations' Handbook (1992-1993)

INCOMING OFFICER'S GUIDE
Incoming Officer To Do List

Incoming Officers will have many to-do's and items to address. It may be overwhelming if you try to jump straight in without a guide. The Office of Student Involvement offers a non-comprehensive list of items an Incoming Officer should consider.

1. Read the transition binder for your Officer Role.

Outgoing Officers created a strong foundation for the future of the Officer Role. Use as needed.

2. Review Officer Role expectations.

Take time to get a good grasp on the purpose of your role and how you are expected to show up.

3. Complete Incoming Officer Questionnaire (in this packet).

Engage in reflection regarding your organization and Officer Role.

4. Meet with Outgoing Officers and Advisors (when available)

Schedule some time to sit down and engage in introductions and further transition.

5. Make appointments with relevant campus partners.

Does your organization have annual collaborations or large-scale events? Introductions are key!

6. Read Through University, Office of Student Involvement, and Organization Policies.

Learn how campus resources can support you and what limitations you may encounter.

7. Ask Outgoing Offices any questions you may have.

Compile notes or questions. Try to be thorough and maximize your time with Outgoing Officers.

8. Reflect on individual goals.

Use worksheets in this packet to guide your reflection.

9. Identify and articulate goals for your role.

Use worksheets in this packet to help you formulate and structure your goal setting.

10. Communicate with your new team.

Establish meeting times and expectations for and from each other. Get the ball rolling!

OVERVIEW OF YOUR ROLE AS A STUDENT LEADER

Just some notes to help you be respected and succeed with 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 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. Keep an open channel of communication to involve all group members to help you incorporate these changes.

6. Base decisions on evidence. 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. Do not play favorites. Give all group members an equal chance to participate.

19. Promote group cohesiveness. Help to create a space where all group members feel they belong through rapport building and connection with the group individuals.

20. Manage conflict, don't ignore it. Bring conflict into the open, and concentrate on issues, behaviors, and facts rather than personalities.
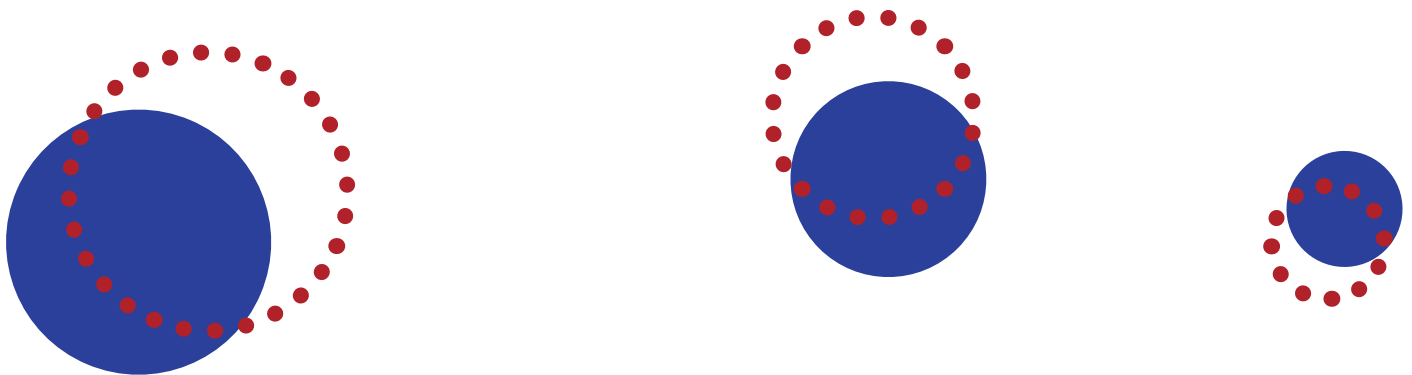
Adapted from: Student Organizations' Handbook - The Wichita State University (1992- 1993)

INCOMING OFFICER QUESTIONNAIRE

1. What are three things do you hope to accomplish during your term as officer?

2. What are three questions you have for outgoing officers?

3. What are you most excited about being an officer?

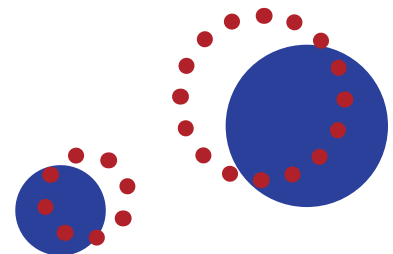4. What is the "Why" for your organization?

5. What are some expectations you have for your board? Advisor?

6. What are some expectations you believe your organization has for you?

7. What services do you need to know about?

8. What areas will need your attention and development?

9. What tasks need immediate attention?

GOAL PLANNING FOR YOURSELF

It is important to take some time to reflect on your personal goals, before you jump in and start planning for your role and organization's next steps. Some goals may be short or long term. This is just a starting space for you to reflect and identify any personal strengths and mindsets that will interact with your leadership roles and organizational goals.

Please be patient and give yourself time to work through these personal questions.

Begin by asking yourself some of these questions:

What are some skills you hope to gain from your new leadership roles?

What are some areas you would like to improve?

What are the first thoughts that come to mind about the past year?
        Mostly positive, negative, or neutral?

What was one of the most interesting things I learned this year?

Who was one person I met that I'd like to get to know better? Why?

What was one of my most challenging moments? Why?

What was one of my favorite accomplishments?

What was one personal strength I used this year? How did it benefit my work or life?

What hurdle came up more than once? (time, money, attitude, location, knowledge, etc.)

How well did I communicate with the people who matter most to me?

What three events or accomplishments were made possible by the help of others?

What advice would I offer someone else on the basis of a lesson I learned this year?

GOAL PLANNING FOR YOUR OFFICER ROLE

Things to consider:

What tone do you want to create in your organization, programming ideas, your growth, who will you be working with, budgets, leadership training, etc.

Begin your personal goal setting now by brainstorming what you would like to see happen during the upcoming year (larger picture - key: longer term).

_____

_____

_____

Now, list things you can do right away: (Be specific - how, when, where...)

Things I want to do starting right now

1.

2.

3.

Things I want to get started on soon

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?

ADDITIONAL STRUCTURES TO FRAME YOUR GOAL SETTING

• 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 term:

New Projects

1.

2.

3.

Implementation of Projects

1.

2.

3.

Improve Projects

1.

2.

3.

Implementation of Changes to Projects

1.

2.

3.

What else will you need to prepare?

  • 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?

GOAL SETTING WORKSHEET

Name	Goal Start Date	Goal Completion Date

My Goal

_____
_____
_____

Steps to Reach Goal	Resources to Help Reach Goal
1. 2. 3.	1. 2. 3.

SMART GOAL SETTING

1. What is the Goal	2. Why is the Goal Important?	3. Goal Completion Date

|	
Specific	Is the goal written clearly? No ambivalence. Is it clear on who needs to accomplish the goal and what resources are needed?
Measurable	Does the goal answer the questions of how many, how often, and/or how much?
Achievable	Can you get the support/resources to accomplish the goal by your target date? Are expected results realistic?
Relevant	Will the goal result make an impact on your organization? Will it improve or make a difference in your organization?
Time-bound	Does the goal state a clear and specific completion date?

Potential Problems: Things that may keep you from accomplishing your goal.	**Action Items:** Specific task to reach your goal. Include who the task is assigned and when it's due.
1. 2. 3. 4. 5. 6.	1. 2. 3. 4. 5. 6.
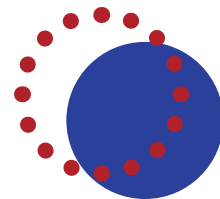
GOAL SETTING BOARD

As you reflect on goals you have individually and for your new officer position, it is important to gather the rest of your team to discuss your group goals and priorities. Use this chart to guide your conversation as you prepare for your new term.

Things to Accomplish	Why We Want This	Barriers	Resources	Unknown Questions
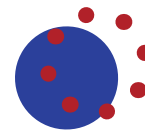
THE ADVISOR AND YOU

In the student/advisor relationship, expectations will be a two-way street. Advisors and student leaders must articulate their expectations of each other. Respect is necessary if the advisor and students are to build a solid base for communicating with each other. Teamwork will be valuable. Each advisor-student relationship is unique, but this should help you start the conversation and navigate your working relationship!

Possible Roles for an Advisor

Your advisor may serve in one or multiple roles, such as those listed below.
- Provide leadership development and skills training.
- Serve as a resource on policies, procedure, contacts, etc.
- Serve as troubleshooters.
- Provide access to internal and external networks.
- Ask questions that will better prepare students.
- Monitor expenditures, policies, and goals.
- Provide continuity from year to year.
- Provide a smoother leadership transition.

Basic Expectations for the Advisor / Student Relationship

For the advisor to...
- Be a resource person, and evaluate projects, performance and progress.
- Offer guidance by reviewing goals, objectives, and the progress of the organization.
- Suggest ways in which the organization may be strengthened or improved.
- Be accessible, and available whenever emergency situations/problems arise.
- Be willing to allow the group to act on its own and to make mistakes.
- Encourage the group to maintain records.
- Encourage task delegation amongst group members.
- Willing to assist in role negotiation for each group member.

For the student to...
- Keep the advisor informed of relevant activities or topics under discussion.
- Meet with the advisor and discuss plans and problems accordingly.
- Act in the best interest and be a representation of the organization at all times.
- Assist peers in the organization to develop skills to enhance DePaul Student experience.
- What other roles can students play in this relationship?
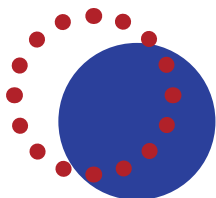
BUILDING A WORKING ADVISOR RELATIONSHIP

1. View this relationship as a partnership. The responsibility for building the relationship must be shared between advisor and student. ·

2. The relationship must be based upon open, direct communication. · Share needs, responsibilities, and expectations with each other. Be prepared to negotiate.

3. Recognize the other's various roles and responsibilities (within and outside of organization). Know each other's commitments and let each other know their impact.

4. Advisors and students can make mistakes, follow their own value systems, and work in individual, professional, person styles. Accept, discuss, and learn from mistakes - then move on.

5. Advisors and students are continually growing, changing, and learning. Every individual is at their own unique stage of development. Challenge and support each other.

Important Conversation Points

- You and the Advisor hold the same goal - Organization success
- You and the Advisor play an essential role on this team
- Your willingness to maintain clear and open communication
- Inquire about the Advisor's established or newly implemented role
- Offer your guidance regarding Organizational functions
- Preferred feedback and supervision styles
- Preferred communication frequency and methods - Email, Drop-In's, etc.

Adapted from Gwost, M.A. (1982). Effective student and advisor relationships. Programming Magazine, Dec

Office of Student Involvement

Student Organizations

2250 N Sheffield Ave Chicago IL, 60614

(773) 325-7361

Visit our Website

involvement@depaul.edu

studentorgs@depaul.edu