



## Officer Transition Checklist

A smooth transition is the responsibility of both the outgoing and incoming members of an organization. This checklist serves as a guide for training new officers, providing closure for outgoing leaders, and helps the organization maintain continuity from year to year.

### CoyoteConnection Transition

- Outgoing Leaders: Edit the Officer Positions for the new academic year
- Outgoing Leaders: Walk-through CoyoteConnection & their Functionaries (such as: Events Process, Document Uploading, Information, Editing, etc.)
- Outgoing Leaders: Share resources such as Student Club & Organization Handbook, University Club Banking Guide, On-Campus Bank Information, etc.
- Outgoing Leaders: Explain Chartering Process
- Outgoing Leaders: Provide all files via a folder, Google Doc, Flash Drive, or CoyoteConnection to the new officers (such as constitution, bylaws, rosters, event plans, room reservations, etc.)
  
- Incoming Leaders: Make sure all information is up to date to prepare for the new academic year
- Incoming Leaders: Walk-through CoyoteConnection to familiarize yourself with the platform
- Incoming Leaders: Organize all resources so they are easily accessible for future use

### CSUSB Policies & Procedures

- Student Club & Organization Special Events Policy
- Alcohol & Other Drugs Policy
- Facilities Use Policy
- Policy on Speech & Advocacy

All Policies are available on:  
<https://csusb.edu/policies>

# Important Dates & Events for New Officers

## Club Leadership Awards Application Due

+ May 1st, 2019

## 2019-2020 Chartering Begins

+ May 15th, 2019

## Club Leadership Awards Night

+ May 23rd, 2019

## SOAR 2019 Club Orientation Dates

+ July 16th, 2019

+ July 22nd, 2019

+ July 24th, 2019

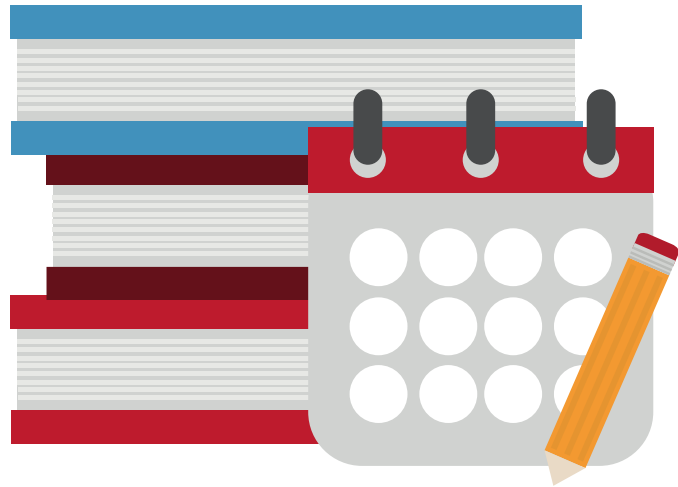
+ August 6th, 2019

+ August 12th, 2019

+ August 14th, 2019

+ August 19th, 2019

+ August 26th, 2019



## Club Orientation Dates

+ September 11th, 2019 from 1P-4P in the SMSU Fourplex

+ September 30th, 2019 from 11A-2P in the SMSU Fourplex

+ October 10th, 2019 from 1P-4P in the SMSU Fourplex

+ October 22nd, 2019 from 11A-2P in the SMSU Fourplex

+ October 30th, 2019 from 8A-12P in the SMSU Fourplex

+ November 16th, 2019 from 10A-1P in the SMSU Fourplex

## Fall Club Fair

+ September 24th from 11AM-2:30 PM on the Pfau Library Lawn

## Events to Keep in Mind:

+ Coyote First Steps Tabling (June 26th & August 7th)

+ Rec & Wellness: Late Night

+ Coyote Fest

+ Snow Day

+ Engagement Expo

+ Spring Club Fair

+ Workshops for Clubs/Organizations & Advisors

+ Leader's Round Table

+ Leadership Symposium

+ Social Justice Summit

+ and more!

# Important University Resources

## Office of Student Engagement

- + Website: <https://csusb.edu/student-engagement>
- + Phone Number: (909) 537-5234
- + E-mail: [oseinfo@csusb.edu](mailto:oseinfo@csusb.edu)

## Associate Students Inc.

- +Website: <https://csusb.edu/asi>
- +Phone Number: (909) 537-5932

## Santos Manuel Student Union

- +Website: <https://studentunion.csusb.edu/scheduling>
- +Phone Number: (909) 537-5962

## Special Events & Guest Services

- +Website: <https://csusb.edu/special-events/scheduling>
- +Phone Number: (909) 537-5236

## Environmental Health & Safety

- + Website: <https://csusb.edu/ehs>
- + Phone Number: (909) 537-5179

## Parking Services

- +Website: <https://csusb.edu/parking>
- +Phone Number: (909) 537-5912

## Risk Management

- +Website: <https://riskmanagement.csusb.edu/>
- +Phone Number: (909) 537-3939

## Title IX Gender & Equity

- +Website: <https://csusb.edu/special-events/title-ix>
- +Phone Number: (909) 537-5669

## CoyoteDining

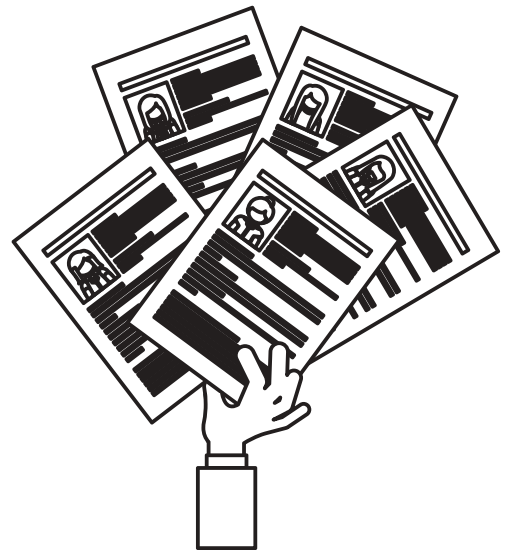
- +Website: <https://csusbcatering.catertrax.com>
- +Phone Number: (909) 537-5916
- +E-mail: [catering@csusb.edu](mailto:catering@csusb.edu)

## Office of Community Engagement

- +Website: <https://csusb.edu/community-engagement>
- +E-mail: [leaveyourpawprint@csusb.edu](mailto:leaveyourpawprint@csusb.edu)

## University Police Department

- +Website: <https://csusb.edu/police>
- +Phone: (909) 537-5165



# Officer Transition Formats

**Shadowing/Mentoring:** Incoming Officers are paired with Outgoing Officers for a specific period of time to learn the position basics and observe the outgoing officers. Through discussion and interaction, outgoing officers share their expertise and insight to incoming officers.

**Retreats:** Retreats provide an opportunity for incoming and outgoing officers to transition materials and discuss pertinent issues.

**One on One Meeting:** Incoming Officers and Outgoing Officers for each position, set up a one on one meeting to discuss the responsibilities of the position, tips, and things they should know relating to that position.

## New Officer Responsibilities

**Goals & Objectives:** Should be determined prior to the start of the new academic year. New officers should host a retreat to discuss at most three measurable goals for the new year, and how they implement these goals. For example, one goal may be to gain membership. The strategy to implement that goal would be to make presentations in classes, to table, and to be present at tabling fairs.

**Meet with your Club Advisor:** Club Advisors are invaluable to your organization. Utilize them for their expertise and advice. Remember that they were once students too. You should also go over your goals and objectives of the advisor. Some advisors need to be reminded of their role.

**New Officer Guidelines:** There are a lot of things to consider when being a new officer. Please see notes below of new officer responsibilities:

- Work on moral of your group members
- Expect any changes to be accepted gradually
- Be available to those who want your help
- Let your group members determine the group's purpose
- Emphasize the process for working through problems rather than the final result
- Approach change through cooperative appraisal
- Encourage brainstorming & creativity
- Promote group cohesiveness
- Share decision making processes
- Share the glory
- Recognize member of your organization
- Manage conflict, don't ignore it
- Make sure you are in good-standing with OSE at all times
- Respect each other's thoughts and opinions