



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 University Resources

Office of Student Engagement

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

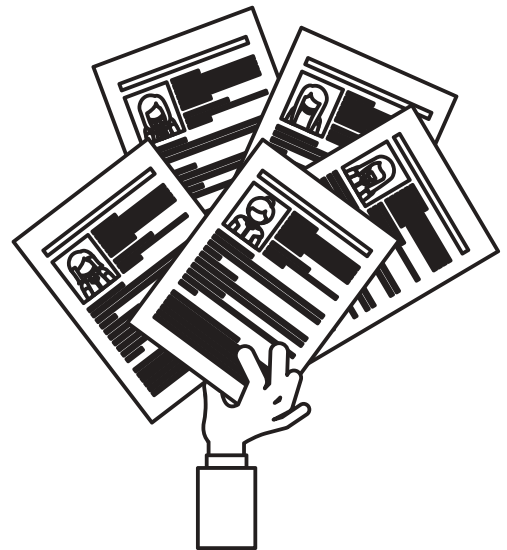
- +Website: <https://csusbcatering.catertrax.com>
- +Phone Number: (909) 537-5916
- +E-mail: catering@csusb.edu

Office of Community Engagement

- +Website: <https://csusb.edu/community-engagement>
- +E-mail: 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