



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.

OrgSync Transition

- Outgoing leaders, edit the administrators and officers.
- Outgoing leaders, provide the new officers with the Student Club and Organization handbook. <https://www.csusb.edu/sites/default/files/OSE-Handbook2016-2017%202.pdf>
- Outgoing leaders, provide the new officers with the University Club Banking Guide, and on-campus bank account information. <https://www.csusb.edu/sites/default/files/Univeristy%20Club%20Banking%20Guide.pdf>
- Outgoing leaders, provide the new leaders with information on how to charter via OrgSync. <https://www.csusb.edu/sites/default/files/How%20to%20Charter%20via%20OrgSync.pdf>
- Provide all files via a folder, Google Doc, Flash Drive, or OrgSync to the new officers. Files include the constitution, rosters, event plans, etc.

CSUSB Policies and Procedures

- Student Clubs and Student Organizations Special Event Policy <https://www.csusb.edu/policies/student-clubs-and-student-organizations-special-events-policy>
- Alcohol and Other Drug Policy <https://www.csusb.edu/policies/alcohol-and-other-drug-policy>
- Facilities Use Policy <https://www.csusb.edu/policies/facilities-use-policy>
- Policy on Speech and Advocacy <https://www.csusb.edu/policies/policy-speech-and-advocacy>

Important Dates and Events for New Officers

- Chartering begins June 1
- Club Leadership Awards applications are due 2nd Monday in May
- Club Conference in the Fall Quarter
- ASI CAB Training

- New Officer Training
- Club Banking Training
- SOAR Tabling Events
- Club Fests/Club Carnivals
- Coyote Fest
- Late Night With Rec Sports
- Club Leadership Awards Banquet

Important University Resources

- Office of Student Engagement <https://www.csusb.edu/student-engagement> 909-537-5234
- Vice President of Student Affairs Office <https://www.csusb.edu/student-affairs> 909-537-5185
- Associated Students Inc., <https://www.csusb.edu/asi>
- Santos Manuel Student Union Scheduling <http://studentunion.csusb.edu/scheduling> 909-537-5962
- Special Events and Guest Services <https://www.csusb.edu/special-events/event-scheduling> 909-537-5236
- Environmental Health and Safety <https://www.csusb.edu/ehs> 909-537-5179
- Parking Services <https://www.csusb.edu/parking> 909-537-5912
- Risk Management <http://riskmanagement.csusb.edu/> 909-537-3939
- Title IX Gender and Equity <https://www.csusb.edu/title-ix> 909-537-5669

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.

New Officer Responsibilities

Goals and 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 will 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 that this is a *student organization*.

New officer guidelines. There are a lot of things to consider when being a new officer. Please see the guide below to help you with the transition into your new leadership position.

NEW OFFICER GUIDE

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 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 for 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 decision 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 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.** Do not play favorites, and give all group members an equal chance to participate.
19. **Promote group cohesiveness.** Make all group members feel as if they belong.
20. **Manage conflict, don't ignore it.** Bring conflict into the open, and concentrate on issues, behaviors and facts rather than personalities. Address conflicts early.