

Advising the Officer Transition



RSO Advisor Development Series
February 12, 2014

Why Officer Transition Is Important



- ❧ Continues Legacy of the Group
- ❧ Student leaders are prepared
- ❧ Opportunity to work with outgoing officers

Advisor's Role



Advisor's Role



- ❧ Invest in the Future of the RSO
- ❧ Encourage Record Keeping
- ❧ Facilitate Transition Meetings
 - ❧ 1. Only outgoing officers
 - ❧ 2. Individual old + new
 - ❧ 3. New officer team

Invest in the Future of
your RSO



Invest in the Future



- ❧ Preparing for the future of the organization should be an on-going project throughout the year
- ❧ This takes the form of:
 - ❧ Developing younger members to eventually take on leadership roles
 - ❧ Taking the time to meet with members
 - ❧ Allowing potential officers to attend executive board meetings.

Help Students Be Proactive!

- ❧ Ask questions to help students think of RSO's future *beyond their tenure*
- ❧ Let younger members explore leadership
- ❧ Schedule elections to allow a transition period.

Record-Keeping



- ☞ Use of Transition Binder
- ☞ All important information in one location.
- ☞ *Transition Binder Checklist*

Facilitating Transition Meetings



Step One: Outgoing Officer Meeting



Assess: The Year in Review

Outgoing Officers



- ❧ By first assessing the previous year without new officers present, outgoing officers can prepare for transition meetings with new officers.
- ❧ Assess, recognize the year's achievements, then help outgoing officers develop POSITIVE advice for new incoming officers to move forward
 - ❧ "Leaving their legacy"

Outgoing Officers - Reflect

☞ Fill out “Major Accomplishments” worksheet

☞ Lists:

- ☞ Each accomplishment
- ☞ Barriers/Limitations
- ☞ Resources used
- ☞ Solutions
- ☞ Still to be done

Year in Review (Outgoing Officers)



Goals

- What was achieved, what wasn't?
- Barriers to goals?
- Resources?
- What should new officers continue to work on?
- What should be discarded?

Year in Review (Outgoing Officers)



☞ Programs and Activities

- ☞ Were they relevant / effective?
- ☞ Too many? Not enough?
- ☞ Marketing strategies?
- ☞ Planning?
- ☞ Which ones should be repeated next year?

Year in Review (Outgoing Officers)



❧ Officers / Organizational Structure

- ❧ Are there clear job descriptions for officers?
- ❧ Are there any unwritten expectations?
- ❧ Is more teamwork needed?
- ❧ How are work levels divided among officers?

Year in Review (Outgoing Officers)

☞ Organizational Operations

- ☞ Adequate finances?
- ☞ Were finances managed effectively?
- ☞ Did meetings run effectively?
- ☞ Too many meetings? Not enough?
- ☞ Is member input considered?
- ☞ Effective committee structure?

Year in Review (Outgoing Officers)

❧ Role of Advisor

- ❧ Communication between officers and advisor?
- ❧ Too much or not enough involvement from advisor?
- ❧ Advisor / officer expectations of each other?

Year in Review (Outgoing Officers)



Public Image

- How do outsiders view the organization?
- How do members view their organization?
- How can image be enhanced?

Step Two: New + Old Officers



Individual and Group Transition Meetings

Transition Meetings (Group: Old and New Officers)



- ☞ Review the year
- ☞ Have old officers provide insight/advice

Transition Meetings (Individual Meetings)



- ❧ Each outgoing officer should meet individually with the officer who is taking over
 - ❧ To help facilitate conversation:
 - ❧ Have each officer fill out “Outgoing Officer Worksheet” or “Incoming Officer Worksheet” and “One on One Meeting Handout”

Step Three: New Officer Team



Planning, Goals and Setting Expectations

New Officers



- ❧ Complete Re-Registration Packet (April 15-September 15)
- ❧ Review Outgoing officers comments
- ❧ Establish Goals (individual and group)
- ❧ Train on resources, policies and procedures

Utilize Resources



- ❧ Office of Student Activities staff are always willing to do Officer Orientations
- ❧ SOOIE
- ❧ Locker Space

Questions?



Thanks for coming! A copy of this presentation and handouts will
be posted on osa.uark.edu