Student Organization

Officer Transition

Guide

Eastern Oregon University

Center for Student Involvement

Campus Resources

*Academic Advising:*

Inlow 112

541.962.3378

advising@eou.edu

*ASEOU (Student Government):*

Hoke 312

541.962.3387

aseou@eou.edu

*Athletics Office:*

Quinn Coliseum

541.962.3364

*Alumni/ University Advancement*:

541.962.3740

alumni@eou.edu

*AV Services:*

541.962.3388

helpdesk@eou.edu

*Bookstore:*

Hoke Union Building

541.962.3691

bookstore@eou.edu

*Campus Security:*

541.962.3911

*Career Advising:*

Inlow 112

541.962.3588

advising@eou.edu

Catering (Aramark)

541-962-3751

*Center for Student Involvement:*

Hoke 216

541.962.3714

center@eou.edu

*Copy Center:*

Inside bookstore

541.962.3505

copysvc@eou.edu

*Counseling Services:*

Student Health Center

541.962.3524

*Disability Services:*

Loso 234

541.962.3663

disabsvc@eou.edu

*Facilities Scheduling:*

Hoke 111

541.962.3575

hrapp@eou.edu

*Financial Aid Office:*

Inlow 201

541.962.3661

fao@eou.edu

*Multicultural Center:*

Hoke 212

541.962.3741

bmoses@eou.edu

*Outdoor Program:*

Hoke 102

541.962.3621

gisaak@eou.edu

*Registrar’s Office*

Inlow 105

541.962.3607

registrar@eou.edu

*Residence Life*

Hoke 216

541.962.3553

reslife@eou.edu

*Student Health Center:*

541.962.3524

Important Numbers

Center for Student Involvement 541.962.3714

Facilities Scheduling 541.962.3575

Aramark 541-962-3751

AV 541.962.3388

Things to Know

* **Check Funds From Your Organization’s Account**

Contact Robin Weinman, the Program Coordinator for the Center for Student Involvement at 541.962.3704 or rweinman@eou.edu

* **Reserve a Room on Campus**

Contact Heather Rapp at 541.962.3575 or hrapp@eou.edu at Facilities Scheduling

* **University Posting Policy/Digital Signage Policy**

Contact Robin Weinman, the Program Coordinator for the Center for Student Involvement at 541.962.3704 or rweinman@eou.edu

* **Reserve AV**

Contact Heather Rapp at 541.962.3575 or hrapp@eou.edu at Facilities Scheduling or AV at 541.962.3388 or gpollard@eou.edu

* **Request Catering**

Contact Aramark Food Services at 541.962.3566

Officer & Member Contact List

**Organization Information** *Please complete only that which is applicable.*

Organization E-mail: Organization Web Site:

Number of Current Members: Date of Next Elections:

Primary Contact Person: Title:

Street Address: City/State/ZIP:

Phone Number: E-mail Address:

**Officers** *If you have additional officers, please attach a list to this form.*

Name:

Title:

E-mail Address:

Name:

Title:

E-mail Address:

Name:

Title:

E-mail Address:

Name:

Title:

E-mail Address:

Name:

Title:

E-mail Address:

Name:

Title:

E-mail Address:

**Members**

Name: E-mail Address:

Student Organization Officer Transition

Following are transition guidelines for outgoing student organization officers to help ease the transition as the newly elected officers take over. Through this transition, the incoming officers will be able to learn from the experience of the previous officers and offer continuity and continued growth for the organization. This information can be passed down through a meeting with the incoming and outgoing officers. It would also be helpful to include this information in a binder for the student organization.

## Items to Include in a Transitional Binder:

1. University Mission Statement

2. Organizational Mission Statement

3. Organizational Constitution & By-Laws

4. Organizational Policies and Procedures

5. Governing Organization Constitution & By-Laws

6. Important names and numbers

7. Student leader job descriptions

8. Budget information

9. Year-end reports and evaluations

10. Pertinent correspondence

11. Resource list

12. Organizational Calendar

13. Important forms

14. University policies and handbook

15. Organizational goals - both met and unmet

16. Name and contact information of outgoing officers

17. Unfinished project information

18. Organizational Goals

19. Specific Officer / Position goals

20. Judicial Policies - Organizational and University

21. Agendas and Meeting Minutes

22. Committee Reports

Topic Areas to Cover:

**Review the group's goals for the previous year**

􀂈 What did we hope to accomplish?

􀂈 How well did we do on each goal?

􀂈 Which goals should be continued?

􀂈 Which goals should be altered?

􀂈 Which goals should be dropped?

**Review programs and activities**

􀂈 What activities and programs did we sponsor?

􀂈 How effective was each program?

􀂈 Did we have a good balance of different kinds of programs?

􀂈 Did we do any community service activities?

􀂈 Were the programs and activities consistent with group goals?

􀂈 Which activities should be continued and which should be dropped?

**Review membership**

􀂈 Do we currently have just enough, too few, or too many members (in light of the group's goals)?

􀂈 How effective were our membership recruitment efforts?

􀂈 Are the members actively involved in the operation of the club (including decision making, planning, implementing, and evaluating)?

􀂈 Are members enthusiastic about the activities and motivated to work towards the group goals?

􀂈 Were there adequate opportunities for members to get involved?

**Review officers and organizational structure**

􀂈 Do officers understand their responsibilities and roles within the organizational structure?

􀂈 Did the officers operate as a team or could cooperation between officers be improved?

􀂈 Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?

􀂈 How would the general membership evaluate the effectiveness of the officers?

􀂈 How would the officers evaluate the effectiveness of the officers? What could be improved?

**Review organizational operation**

􀂈 Was the budget managed properly?

􀂈 Were meetings run effectively?

􀂈 Was the frequency of meetings appropriate?

􀂈 Do we have a committee structure? If so, is it working? If not, is it needed?

􀂈 Do we experience scheduling conflicts with other groups or activities?

**Next Steps**

􀂈 Work together to make a list of “things to do” for the incoming officers.

􀂈 Which items need their attention now?

􀂈 Make this list together so the outgoing officer can help with direction.

􀂈 Make sure to trade contact information so that the outgoing officer can be a resource in the year ahead!

**Additional information to include**

What are the major strengths of our organization?

What are the major weaknesses?

What is the best advice we, as outgoing officers, can give to the new officers?

**Have the new officers meet individually with their predecessor and discuss the following:**

􀂈 Responsibilities of the position

􀂈 Timetable for completing duties of the position

􀂈 Unfinished projects

􀂈 Important resources and contact persons

􀂈 Mistakes that you made that could have been avoided

􀂈 Advice the outgoing officer wishes he/she had been told before assuming the office last year

􀂈 Any questions the new officer may have for the outgoing officer

􀂈 How the outgoing officer can be reached in the future (in case more questions arise)

Maintaining Continuity: Old Officers

1. What do you perceive to be your organizations objectives or goals?

1. What do you consider to be the responsibility of your office?

1. What do you wish you had done, but did not?

1. What did you try that did not work? Why did it not work?

1. What problems or areas will require attention within the next year?

1. Who was the most helpful in getting things done (who were good resources)?

1. What should be done immediately in the fall?

Maintaining Continuity: New Officers

1. What do you perceive to be your organization’s objectives or goals?

1. What do you consider to be the responsibilities of your office?

1. What are the expectations for yourself in your office?

1. What expectations do you have of the executive council/board?

1. What expectations do you believe your members have of you?

1. What problems or areas will require attention within the next year?

1. What should I do over the summer?

1. Who do you anticipate will be most helpful in getting things done?

1. Write down one specific problem you anticipate you will encounter during your term.

Student Organization Transition Document

## Outgoing Officer To Do List

* **Organize all notebooks and files**
* **Finish all necessary correspondence (letters, e-mail, phone calls)**
* **Prepare year-end report and evaluation**
* **Develop action plan and time-line for new officer transition**
	+ **Necessary meetings attended and conducted by officer**
	+ **Important tasks**
	+ **Sharing tasks and duties with other group members**
	+ **Introductions to key people (relationship building)**
	+ **One on one meetings and training**
	+ **Financial information**
	+ **Leadership training**
* **Complete outgoing officer information sheets**
* **Prepare/update Officer Handbook**

**Goals**

What did we hope to accomplish?

How well did we do on each goal?

Which goals should be continued?

Which goals should be altered?

Which goals should be dropped?

**Programs and Activities**

What activities and programs did we sponsor?

How effective was each program?

Did we have a good balance of different kinds of programs?

Did we do any community service activities?

Were the programs and activities consistent with group goals?

Which activities should be continued and which should be dropped?

**Membership**

Do we currently have just enough, too few, or too many members (in light of the group's goals)?

How effective were our membership recruitment efforts, if any?

Are the members actively involved in the operation of the club (including decision making, planning, implementing, and evaluating)?

Are members enthusiastic about the activities and motivated to work towards the group goals?

Were there adequate opportunities for members to get involved?

**Officers and Organizational Structure**

Do officers understand their responsibilities and roles within the organizational structure?

Did the officers operate as a team or could cooperation between officers be improved?

Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?

How would the general membership evaluate the effectiveness of the officers?

How would the officers evaluate the effectiveness of the officers? What could be improved?

**Organizational Operation**

Was the budget managed properly?

Were meetings run effectively? Was the frequency of meetings appropriate?

Do we have a committee structure? If so, is it working? If not, is it needed?

Do we experience scheduling conflicts with other groups or activities?

Retreat Planning Guide

***Resources:***

Locations:

· Area hotels

· Campus offices / rooms

· Camping grounds

· Local alumni / residents homes

· State parks

Agenda(s):

*Important items to include:*

· Opening activity / ice breaker

· Meals and prep time to cook / clean up

· Both large and small group activities

· Unstructured time to allow thought, growth, and development

· Breaks

· Group interaction and discussion

· Sufficient time in case activities run over schedule

· Evaluation and assessment

**Steps for Planning Organizational Retreat**

**I. Assessment of Needs**

A. The assessment should be conducted by either the coordinator(s) of the retreat, member(s) of the planning committee, the president, or other officer(s) designated by the planning committee

B. Assessment will help identify concerns, needs, and desired outcomes as well as determining the participant’s preferred format for the program

C. The method of assessment should help determine what types of activities and programs to be used, the style of presentation, and to what extent the retreat will focus on the following:

1. Problem solving - focusing on immediate problems of an organization

2. Competency model - focusing on possibilities and desired outcomes (where are we now..., where do we want to be?)

D. Methods of Assessment - Important to use advisor and/or facilitator in assessment process to get as much objective information as possible

1. Questionnaire

2. Personal Interviews

3. Combination of both questionnaire and interviews

4. Observation

**II. Setting Goals and Objectives of Retreat**

A. Objectives would be related to the needs identified in the assessment and focus on what the retreat is attempting to accomplish.

B. Objectives should be broken down according to the types of learning to be achieved:

1. Knowledge Learning - What information participants possess after the retreat (Constitution, policies, organizational goals, etc.)?

2. Skill Learning - What skills should participants possess after the retreat (Time management, planning / programming skills, confrontation skills, etc.)?

3. Attitude Learning - What attitudes should participants possess after the retreat (group cohesiveness, optimism, respect, value formation, etc.)?

**III. Organization of Retreat Planning**

A. This step involves determining the activities, content, and programs which will best accomplish the retreat objectives.

B. Select the topics and methods to be covered.

Factors to Consider:

1. Will the topics and methods meet the objectives of the retreat?

2. Are the topics consistent with the participants’ expectations, skills, and knowledge level?

3. Are there resources, materials, and staff available for the topics and methods selected to be covered?

4. Is there sufficient time and space available to accommodate the topics and methods selected to be covered?

C. Examples of possible methods and topics

1. Team building exercises - Develop group cohesiveness

2. Lecture - Education on organization’s constitution and policies

3. Role play - Confrontation skills

4. Brainstorming - Goal setting

**IV. Make Arrangements**

A. Logistics - This step of the planning process includes factors such as practical constraints of money, time and staff availability, physical space and equipment limitations, as well as size of the group involved

B. Budgeting - This is a very critical component of the planning process. Budgeting should be taken into consideration throughout the entire planning process.

*Factors to Consider in Budgeting Process*:

1. Facility cost

2. Materials, copying, and equipment

3. Refreshments and/or meals

4. Certificates and recognition

5. Outside presenters

6. Travel

C. Selecting the Date and Time:

1. Needs and expectations of participants should be taken into consideration

2. Must be sufficient time to achieve objectives of retreat

3. Notification of date and time should be set to allow participants sufficient time to make arrangements

D. Choose the Facility:

1. Area and space should be sufficient to conduct activities and program

2. The climate of facility should be conducive for the learning process of the retreat

E. Designating Responsibilities - This step involves delegating planning responsibilities and selection of staff / members or outside individuals who will be presenting topics or facilitating events

1. Designate planning responsibilities to members of planning committee

2. Request services from outside presenters or facilitator

3. Preparation of activities / programs to be implemented by organizational members

4. Develop a checklist of tasks to be completed and by whom

5. Develop a step by step plan of action (Example)

Time Activity Objective Responsibility Equipment

10 - 10:30 Open / Icebreaker Attitudes John Smith None

10:30 - 11 Goal Setting Knowledge Jennifer Jones Handouts

11 - 12 Lunch Attitudes Betty Brown Food

F. Promotion of Retreat - Essential to publicize the retreat and inform participants on agenda, goals of retreat, and communicate importance of retreat

**V. Execution of Retreat Plans**

A. Setting up Process

1. Confirm responsibilities with planning committee to make sure all tasks are completed

2. Allow a sufficient amount of time to arrive ahead of beginning time to set up and organize material, equipment, refreshments, etc.

3. Provide plan of action for all retreat organizers and presenters to refer to during the program

**VI. Evaluation**

A. Evaluation of the retreat should provide feedback on:

1. The planning process (by Planning Committee - done throughout retreat planning)

2. Each activity component of retreat (by Participants)

3. If the goals of retreat were met (by participants and planning committee)

4. Usefulness and applicability of activities to the organization (by participants and planning committee)

B. The phases of the evaluation process should involve the following steps:

1. Organizational - made at the initial step of the planning process (assessment)

2. In-Process - Throughout organization of planning responsibilities and implementation of retreat (done through verbal and survey methods)

3. Program Feedback - Immediately after retreat process (usually by survey method)

4. Follow-Up - Done three to six months later to evaluate progress which has been made since the retreat

C. The different phases of the evaluation process can be compared to evaluate and assess if the goals of the retreat were met.

**VII. Follow-Up**

A. Thank you’s for planning committee and outside presenters / facilitator

B. Pay bills

C. Summarize evaluation results

D. Organize evaluation report to share with participants

E. Analysis of issues and ideas developed at retreat

1. How are ideas being implemented

2. If goals of organization are being met

3. Are skills (cognitive, behavioral, affective) being utilized within the organization

4. Use information from follow-up in the planning process for next retreat

**VIII. Other Factors to be Taken Into Consideration**

A. Allow sufficient time in the planning process

B. Establish Clear Retreat Goals - the more specific the goals and objectives, the more explicit the design, with a better chance of meeting the needs of the group

C. Maintain Variety - vary the time, amount of risk, presentation, presenters, settings, and the type of interaction during the retreat

D. Be Creative - this will create interest and facilitate further involvement and interaction of participants

E. Involve the Group - Important to involve the group in activities and programs. The more active the participants, the greater the interest and learning will be.

F. Allow for Breaks

G. Participants will learn best when they can experience and practice.

H. Learning can and should be fun

I. Individuals will take greater risks in group situations if the group is supportive

J. People seldom learn the first time - new ideas are learned while building on the old (sequencing and reinforcement)

K. Incorporate socializing into overall program

L. Integrate interaction and recognition into retreat (provide certificates, awards for most presentation, etc.)

M. For more suggestions or ideas, seek the advice of professionals, mentors, and / or advisors

Evaluation & Assessment Guide

Officer / Chair Evaluation

This evaluation is to constructively evaluate student group officers / chairs to let you know what areas you are strong in and what areas you need to improve.

**Name of Student to be Evaluated**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Period of Evaluation**: \_\_\_\_\_\_\_\_\_\_\_ through \_\_\_\_\_\_\_\_\_\_\_\_

**O** = Outstanding | **V** = Very Good | **G** = Good | **A** = Adequate | **P** = Poor

**NA** = Not Applicable

**I Feel the Officer / Chair:**

Shows a sense of direction regarding his/her job O V G A P and knows what he/she should be doing.

NA

Has the ability to obtain and analyze facts and O V G A P apply sound judgment.

 NA

Is effective at organizing his/her work. O V G A P NA

Displays enthusiasm about his/her job. O V G A P NA

Shows a willingness to do more than asked. O V G A P NA

Communicates well with students. O V G A P NA

Communicates well with staff. O V G A P NA

Provides creative ideas and valuable suggestions. O V G A P NA

Follows through on the responsibilities assumed. O V G A P NA

Is on time for meetings, etc. O V G A P NA

Motivates students to work effectively. O V G A P NA

Provides a good example of leadership for others. O V G A P NA

Is objective in decision making. O V G A P NA

Produces a high-quality work. O V G A P NA

Displays a sense of professionalism. O V G A P NA

Overall effectiveness as an officer/chair. O V G A P NA

**I think this officer’s / chair’s strengths are**:

1.

2.

3.

**I think this officer’s / chair’s areas of improvement are**:

1.

2.

3.

**Overall rating of this officer / chair**:

**O** = Outstanding | **V** = Very Good | **G** = Good | **A** = Adequate | **P** = Poor

**O V G A P**

**Additional comments regarding the performance of the officer/chair:**

Advisor Roles & Responsibilities

Every student club/organization must have a faculty or staff advisor to become a recognized at Eastern Oregon University. The primary role of the advisor is to actively serve as a resource person for the club/organization. Advisors should be available to provide advice and counsel student clubs/organizations by asking and generating questions, encouraging students in their thinking process and generating additional learning opportunities and challenging the organization to go above and beyond the status quo. Furthermore, advisors provide continuity to a club/organization as they can pass along valuable information regarding the history of the organization and their past accomplishments. Active advisors can improve the effectiveness of a club/organization while also providing positive leadership development for students.

An advisor can play multiple roles within the club/organization. The following are roles and/or broad categories that advisors often fall under:

* **Leadership growth and development:** The advisor regularly assists students in the development of lifelong and necessary skills relevant to learning such as time management, problem-solving, delegation, and communication.
* **Organizational liaison:** The advisor is able to explain university policies and connect students to the appropriate offices and individuals for assistance.
* **Program assistance and organizational purpose:** The advisor assists students in the development of activities, events and projects by maintaining active recognition among the campus community. The advisor encourages members to find opportunities to meet the organization’s goals on a regular basis.

The role of the advisor can vary from one club/organization to another, based on the club/organization’s needs and goals. Appropriate communication should occur between the advisor and the student organization to determine what that role will look like during the year. It is important to remember and remind the students involved in the club/organization, that the role of an advisor is not to be ‘just a signature’ in order to receive recognition.

**Expectations:** Depending on the club/organizations, the specific expectations of an advisor depend on the student organization's needs and the advisor’s leadership style and acceptable level of commitment. The following is a list of possible expectations, which can be used during discussion between the advisor and the student organization. When there are items that are deemed not the responsibility of the advisor, it is important to clarify who will assume the responsibility for those tasks.

* Attend all general and executive board meetings
* Call meetings of the executive board when s/he believes it is necessary.
* Explain university policy when relevant to the discussion.
* Explain university policy to the executive board and depend upon the officers to carry them out through their leadership.
* Explain university policy to the entire membership at a general meeting once a year.
* Reserve an appointment with the chair before each meeting.
* Help the chair prepare the agenda before each meeting.
* Serve as parliamentarian for the group.
* Speak up during discussion when s/he has relevant information or when the group is likely to make a poor decision.
* Be observant during general meetings and pose questions as needed.
* Exert his/her influence with officers between meetings.
* Take an active part in formulating the goals of the group.
* Initiate ideas for discussion when s/he believes they will assist the group.
* Be a part of the group except for voting and holding office.
* Require the treasurer to clear all expenditures before financial commitments are made.
* Request to see the treasurer's book at the end of the term.
* Check the secretary's minutes before they are written in a final form.
* Check all official correspondence before it is sent.
* Get a carbon copy of all official correspondence.
* Be custodian of all group paraphernalia, records, etc. during the summer and between officer transition.
* Keep the official files in his/her office.
* Inform the group of infractions of their bylaws, codes, standing rules, and constitution.
* Keep the group aware of its stated objectives when planning events.
* Veto a decision when it violates a stated objective, the bylaws and codes, standing rules, constitution or university policy.
* Mediate interpersonal conflicts that arise.
* Be responsible for planning leadership skills workshops.
* State what their responsibilities are, or as they see them, at the beginning of the school year.
* Let the group work out its problems including mistakes and "doing it the hard way."
* Conduct an evaluation of each activity by those students responsible for planning it.
* Take the initiative in creating teamwork and cooperation.
* Let the group thrive on its merits; do not interfere unless requested to do so.
* Be familiar with university facilities, services, and procedures, which affect group activities.
* Recommend programs, speakers, etc.
* Take an active part in the orderly transition of responsibilities between old and new officers at the end of the semester or year.
* Cancel any activities when s/he believes they have been inadequately planned after consulting with the organization.

As an advisor, you will also have expectations of the student organization you advise. Remember to discuss these with the organization at the beginning of the year. Some expectations may include:

* Written goals and objectives
* Advance notification of all meetings and events – term calendar
* Awareness and adherence to all university policies
* Organization's attendance at meetings and events
* Support an understanding of the university's mission
* Financial maturity and responsibility
* Open communication
* Honesty
* Commitment to the organization

**What Makes a Good Advisor?**

First and foremost, remember that you are a role model for the students you advise. Believe in those students and help them realize their full potential. By believing in them and their accomplishments, they will learn to believe in themselves and strive for their best. Remember to continually give them positive and constructive feedback. This type of evaluation will help them learn and grow as student leaders.

As they grow, provide them with an environment that promotes positivity and success. Take the time to get to know the students you advise as individuals – not just as students in a club/organization. Share your experiences and thoughts with them, while finding out their own thoughts and experiences. The time you spend with your students will leave a long-lasting impression on them as they graduate and begin to have professional careers. Looking back on their experiences, they will remember the role model, who helped them become who they are and led them down the right path.

**![C:\Documents and Settings\Riebling\Local Settings\Temporary Internet Files\Content.IE5\GPIJKTEF\MC900391212[1].wmf]()Get in Gear for Next Year!**

The year is winding down and many of you are wrapping up and planning for next year. Here are a few things that OrgSync can assist you with as you close out your year!

1. **Sign up for the Fall Club Fair!** Don’t miss the opportunity to sign up for one of the most powerful recruitment tools this fall. The Fall Club Fair will be Wednesday, September 26th from 1-3pm. If your organization would like to sign up to host a table, be sure to click the link and complete the form online at: eou.orgsync.com.
2. **Update your Executive Board!** Did you change officers? Make sure you have them noted correctly in OrgSync! Having an updated roster will ensure that you receive all the important updates from the Center for Student Involvement and other departments on campus.
3. **Throw away those binders!** OrgSync gives you unlimited file storage within your portal and information can so easily be lost during officer transition. So take a few moments to upload those documents so that they’re no lost for years to come (posters, power points, word documents, excel spreadsheets, meeting minutes, pictures etc.). Keeping electronic copies of your files will help to track and build that history for your organization.
4. **Say goodbye to the alumni!** Create an account group for Alumni and move any members who are graduating into that group. This will allow you to filter what information you want to send to individuals that have graduated. This is a great way to stay in contact!
5. **Create or update your website**! Summer is a great time to do this and OrgSync gives all student clubs and organization the ability to create a website through OrgSync, for FREE! Don’t know where to start? Contact the Center for Student Involvement for the opportunity to learn how! It is very easy to learn and fun to use!
6. **![C:\Documents and Settings\Riebling\Local Settings\Temporary Internet Files\Content.IE5\GPIJKTEF\MC900391212[1].wmf]()Keep in touch!** Just because you’re not seeing each other at weekly meetings over the summer doesn’t mean you can’t keep in contact. Start up a discussion board in OrgSync to keep the momentum going over the summer. Post questions, brainstorm ideas for the school year, or start dialogue about interesting topics. Members can submit their comments on their own time and still contribute to the organization over the summer months.