

RSO Resource Guide: Officer Transitions

This packet will help your RSO successfully transition officers. Remember, this is a multi-step process with many involved parties. Open communication and a shared mission & vision will help your RSO successfully transition officers.

This packet includes:

1. Outgoing Officer Checklist
2. Outgoing Officer Transition Worksheet
3. Incoming Officer Checklist
4. Incoming Officer Transition Worksheet
5. Sample Agenda for transition meeting
6. Incoming Officer Meeting sample agenda
7. Officer Operations portfolio sample

Outgoing Officers Checklist

Your time as a leader in your RSO is coming to a close. You've hopefully met your goals and created a lasting legacy for yourself. Your hard work has paid off, and now it's time to allow the next leadership team take the wheel. Consider the following to ensure a smooth transition and ensure your legacy remains positive.

Sample Checklist

Before meeting with the new leadership team of your RSO, take time to complete the following:

- Gather documents and files that may be relevant
- Review the Transition Worksheet
- Finish necessary correspondence (emails, EPRs, Payment Request Vouchers)
- Review the constitution or other documents that may need revision
- Review the position description in the constitution
- Develop an ACTION PLAN with the other outgoing executives
 - Position descriptions
 - Outstanding tasks
 - Introductions to key staff, faculty, and other student leaders
 - Annual Orientation!
 - Financial information/SOFS info for your treasurer, specifically.
 - Allow the Incoming officer to shadow you while doing RSO tasks.
- Prepare any updated operations portfolios *see attached for suggestions*
- Help new officers update their NvolveU2.0 positions and renew the RSO.

If you have further questions, please reach out to us!

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Outgoing Officer Transition Worksheet

(Typically completed prior to a transition meeting with new Officers)

Please think through and respond to the following questions regarding your responsibilities. Be willing to share this information honestly with your successor – it will be helpful! Share this during your 1:1 time with the new officer.

What I liked best about my position...

What I liked least about my position...

What I wish I had done, but did not was...

To make my experience better, I could have...

Obstacles to performing my position effectively were...

Resources which assisted me in handling my position were...

Things I wish I'd known before I took the position were...

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Incoming Officer Check List

Congratulations! This is an incredibly exciting time for you! As a new Officer in an RSO, you are off on a great adventure to lead the RSO through another successful year. It can be nerve-wracking, and there is a lot to do, but this check list should help get you started.

Sample Checklist

- After being elected, immediately make plans to attend **Annual Orientation** hosted by Student Leadership, Involvement & Community Engagement (if you are a President, Treasurer or Primary Programmer this is required). You can RSVP on NvolveU.
- Before attending Annual Orientation, ask the outgoing officers to complete the RSO Renewal Process & update the Officers on NvolveU. We review all the position requests and will approve the request when you attend Annual Orientation.
- Review your constitution and other documents. Make sure you know your role and responsibilities.
- Make sure to meet 1:1 with your predecessor to learn more about the position and review the Incoming Officer worksheet with them.
- Shadow the Outgoing officer to see what their tasks are and how they execute the tasks.
- After shadowing, think about how you would do tasks. You don't need to be an exact replica of your predecessor.
- Meet as a group of new officers and your advisor - see below for more ideas what to include in that meeting.
- Complete any outstanding tasks with the outgoing officers.

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Outgoing Officer Transition Worksheet

(Questions to ask during transition meeting)

What should be done before the semester ends, during the break, and at the beginning of the new semester?

Faculty, staff, and student organization officers that I should get to know...

Campus and off-campus services and resources I need to know about...

Things I need to know about working with other officers, the chief student leader, and/or advisor...

Other questions I want answered...

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Sample Agenda for a Transition Meeting

This meeting should be facilitated by the executive board officers and it is helpful if advisor(s) are present. Immediately after the election or appointment of the executive board officers, it is highly recommended that both the outgoing officers and/or advisor help plan the agenda. The following is a sample agenda for this meeting that can help you make your transition meeting flow as smoothly as possible. Remember, this is a general idea – edit as you see fit to make this work for your RSO!

I. Welcome and Introductions

Help participants get acquainted and explain the purpose of the meeting

II. The Year in Review

A. **Goals:** Review the group's goals for the current year.

What did we hope to accomplish?

How well did we do on each goal?

Which goals should be carried on this year?

B. **Programs and Activities:** Evaluate what your group did.

How effective were the programs / activities we coordinated?

Were our programs and activities consistent with our goals?

Which activities and programs do we want to repeat?

C. **Membership:** Evaluate number of members and their commitment.

Do we have too many, too few, or just the right amount of members?

Were our recruitment efforts successful?

Are our members as actively involved as we want them to be?

Were there chances for members to get involved in a meaningful way?

D. **Officers and Organizational Structure:** Evaluate officers and structure.

Are officer roles and responsibilities clearly described?

Did officers work as a team, or is there more teamwork needed?

Is the time and effort required in each office comparable?

Is there two-way communication between officers and members?

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Sample Agenda for a Transition Meeting, Continued

- E. Organizational Operations:** Evaluate finances, communication, etc.
Were the finances adequate for our group, and managed properly?
Were meetings run effectively? Was their frequency adequate?
Did the committee structure work?
Did we have scheduling conflicts with other groups or activities?
Was the constitution followed to run the organization?
Are there suggested and/or mandatory amendments to the constitution?
- F. Advisor Involvement:** Evaluate both quality and quantity.
Did our advisor meet the group's expectations (which were discussed in advance)?
Did we keep our advisor informed of organization programs and activities?
Did we give our advisor a chance to get involved?
- H. Reputation:** Evaluate how other groups perceive you.
How do we see ourselves? Is this how "outsiders" see us?
How can we enhance our reputation?

III. Outgoing and New Officer Transition

Have the new and outgoing officers meet individually to discuss:

- A. Responsibilities of the position, with a job description if possible.
- B. A timetable for completion of annual duties.
- C. Unfinished projects.
- D. Important contacts and resource persons.
- E. Mistakes that could have been avoided.
- F. Advice for the new officer.
- G. Any questions the new officer may have.
- H. Where the outgoing officer can be reached with future questions.
- I. Adjournment & Wrap-Up (no more than 15 minutes)

Provide an opportunity for informal socializing.

Highly Recommended: *New officers conduct a short meeting to debrief transition meeting, discuss immediate requirements prior to end of semester, identify things to accomplish during break and early semester, and collect contact information*

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Sample Agenda for Incoming Officer Meeting

It's best to have a meeting of the Incoming Officers and the advisor(s). It's a great way to start the new term off on the right foot and have a successful start to your time as an officer. We suggest having the large group meeting of outgoing and incoming officers first, attend Annual Orientation, and then have this meeting. This way, all members and advisor(s) have completed much of their tasks and are ready to tackle business.

I. Introductions - Get to know one another – do some sort of activity that helps build community and helps each other feel comfortable.

II. Review Documents

- a. Constitution – make sure all understand the constitution and clarify questions
- b. Positions – review each position and make certain all leaders know what's expected
- c. Annual Orientation

III. Set Expectations

- a. There are some documents available on involved.unl.edu that can help you set:
 - i. Advisor Expectations
 - ii. Peer Expectations
 1. Consider things like...
 - a. Communication (email, phone, text?)
 - b. Involvement (advisor)
 - c. How will you hold each other accountable?
 - d. How will you approach conflict?

IV. Set Goals for the year

- a. Keep in mind: while last year was great, this year is built on your goals as a group.

V. Set meeting times/decide frequency of Officer & Advisor meetings

VI. Make sure you have each other's contact information for follow up meetings

VII. Conclude

- a. It's wise to have task lists for everyone going forward
- b. Let people know when the next meeting

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Officer Operations Portfolio

The officer operations portfolio is a beneficial resource in orienting the new officers with all the functions and responsibilities of their position. The portfolio should cover all aspects of officer responsibilities and how those tasks fit into the organization's operations. The portfolio can be digital or hardcopy, but should be consistent and organized. This is by no means an exhaustive list, but a good start to helping the RSO build a complete portfolio for future officers to be successful.

Should Include:

- Organizational Mission and/or Vision Statement and/or Core Values
- Organizational Constitution and By-Laws
- Organizational Policies and Procedures

- National Governing Organization Constitution, By-Laws, and/or Charter (if applicable)
- University Mission Statement
- University Policies and Student Guidelines

- Historical Information (i.e. rituals, traditions, significant changes with reasons, milestones)
- Organizational Chart
- Officer Position Job Descriptions and Responsibilities
- Budget and Financial Guidelines from SOFS

- Current Organizational Goals
- Specific Officer/Position Goals
- Officer Specific Task Timeline in Chronological Order by Month
- Important Forms
- Important Resources and Services Numbers Contact List

- Calendar of Events
- Agendas and Meeting Minutes
- Committee Reports
- Program/Event Planning Documents and Evaluations
- Year-End Reports and Evaluations

- Pertinent Correspondence
- Unfinished Project Information
- Name and Contact Information of Outgoing Officers

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