

Registered Student Organization Officer Transition Guide



Student Activities Office

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INTRODUCTION: What are officer transitions and why do we have them?

Don't just pass the binder! Officer Transitions are a vital part of a successful organization and help ensure that RSOs continue to grow and develop to their fullest potential. This document will provide you with some of the tools needed in order to have a rewarding and efficient officer transition. Not only does an officer transition help minimize confusion for an RSO's new leaders, it creates a more confident and determined officer. This document will go through steps of preparation for both old and new officers, and ultimately facilitate the creation of outstanding new leaders!

CONSIDER WHAT IS BEST FOR YOUR ORGANIZATION

One of the most important concepts in this guide is that all student organizations are uniquely different. This guide does not serve as a comprehensive list, rather a resource to get the wheels turning on what individual needs your RSO may have. Every organization will thrive from a different type of officer transition, and the information we provide can be discussed in a number of ways, including the following:

1. **Retreat:** Full day training session
 - a. Topics of conversation may include: history of your organization, mission and values, officer introductions, ice breakers, one-on-one facilitated officer meeting time, group conversation on suggestions or tips, etc.
2. **Training Meeting:** Half day
 - a. Use this guide as a large part of your group meeting time, select any other topics that should be covered for all of your officers' benefit
3. **One-on-one Meetings:** About one hour
 - a. Incoming and outgoing (if available) officers will meet individually and utilize this guide in order to facilitate their transition

Remember, do what works best for your organization while utilizing this guide as a resource. If you would like guidance, speak with your SAO Advisor!

PREPARATION: Potential documentation to be shared

The following is a list of potential documentation to be shared with or obtained by new officers.

1. Constitution
2. Mission and goals of organization
3. Member contact list
4. Other important contacts*
5. Annual procedures/events
6. Minutes from meetings
7. Email information & Community login
8. Social media login information
9. Registration information
10. Financial records
11. Bank account information
12. Historical documents
13. Information on RSO Resource Center
14. Calendar
15. **Any other specific information pertinent to your RSO**

*May include: SAO advisor, faculty/staff advisor, important community members, donors, alumni, annual event services contacts, etc.

Google Drive

- Google Drive is becoming an increasingly popular and helpful way to assist with your officer transitions. With Drive, you can keep most of your documents and items in one central location, reducing the possibility of any items being lost.
- This also ensures that officers are all getting the same documents and items that are important for their success. If anything new comes up, you can also add it there.
- Similar to physical documents and binders, don't just share the Google Drive with new officers, make sure to go over each document and item with the new officer to ensure that they understand what it is and why it is important.
- Keep the Drive organized to ensure officers can easily find what they need.

PROCEDURES: Things to discuss with incoming/outgoing officers or to consider on your own

Before beginning to tackle the list of potential topics, please take the time to consider what you believe is most important for an incoming officer to understand. Remember that your organization is unique, and there may be numerous other topics to discuss.

1. Required Actions

- a. Attend re-registration session in Autumn Quarter, follow subsequent steps
- b. Switch officer names on RSO Community by emailing sao@uw.edu or visiting the office in person (HUB 232)

2. Goals

- a. Review/evaluate last year's goals
- b. Which goals were and were not attained? Why?
- c. How can these goals be adjusted for this year?
- d. What new goals do you have? (SMART goal)*

3. Programming

- a. How was the flow of the organization's programming?
- b. Was there too much/not enough?
- c. Does the programming follow your mission and values?
- d. Do meetings run effectively?
- e. How can programming be changed? (SMART goal)*

4. Recruitment

- a. How many new members were gained? How many members were lost?
- b. How is retention throughout the year?
- c. How can recruitment efforts be improved? (SMART goal)*

5. Marketing

- a. What is our image?
- b. How do we promote ourselves on campus?
- c. How do we utilize social media?
- d. How can we improve our marketing? (SMART goal)*

6. Events

- a. How many/what events were held? How successful were these events?
- b. Should these events be repeated? How can they be improved? (SMART goal)*
- c. What new events should be considered?

7. Membership

- a. What does involvement in your organization look like?
- b. Are all members included and given leadership opportunities?
- c. Are all members fulfilling their duties?
- d. How can membership be improved? (SMART goal)*

8. Officers

- a. Are roles well defined?
- b. Do we need more/less officers?

- c. Is work evenly distributed?
- d. Do officers function together as a team?
- e. Is there good communication between officers and members?
- f. How can officer duties be improved? (SMART goal)*

9. Funding

- a. What does the current budget for your organization look like?
- b. What sources do you receive funding from? When do you need to apply?
- c. How have funds been allocated in the past?
- d. Which parts of our organization are in need of more/less funding?
- e. What is our goal to obtain and utilize funding next year? (SMART goal)*

10. Connection with SAO

- a. Are the advisors utilized as a resource?
- b. How can we get them more involved?

SMART Goals*

Specific (Who? What? When? Where? Why?)

Measurable (How much? How will you know this goal is met?)

Achievable (How realistic is your goal? Do you have the necessary resources?)

Relevant (Does it align with your goals? Is it important at this time?)

Time based (How long will it take? What can you do today? What can you do in 2 weeks?)

SMART goals are a useful technique to ensure well-structured planning and execution of change.

OUTGOING OFFICERS

It is important to recognize all of the great work you have done and reflect on your accomplishments throughout your term. The following prompts are methods to reflect on your leadership within your organization:

1. What challenges did you face during your term? How did they help make you a better leader?
2. How will you utilize the skills you have learned through this position in your future?
3. What insights or suggestions would you offer your incoming officer?

As an outgoing officer, it is also your responsibility to pass along information and make any necessary changes, such as the following:

1. Discuss with your incoming officer what insights or helpful information you have to offer your incoming officer
2. Physically pass over any documentation listed above
3. Make specific changes to names on reservations, bank account information, change officers on the RSO Community web page, etc.
4. Any other pertinent information specific to your organization and role within it

INCOMING OFFICERS

As you prepare for your journey as an officer for your organization, there are several ideas to consider. The following are some prompts to spark your thinking on what to begin preparing for:

1. What are your goals when entering this position?
2. How do you hope to grow as both a leader and an individual?
3. What obstacles do you imagine facing? How do you plan to overcome these?
4. What resources do you have available to assist you in your journey?
 - a. Here are some beginning ideas: RSO Community; HUB website with links to a guide on funding, forms, resources and more; your SAO Adviser; RSO Resource Center; Event Services; and much more!

Additionally, it is vital to make sure you have access to resources you may need to utilize. These may include RSO Community, social media, bank account information, etc.

PRO-TIPS

1. Add officer transitions to your constitution!
2. Start early!
3. Ask SAO!

RESOURCES

RSO Resource Center

- Location: HUB 111

- Phone: 206-221-3327
- Email: source@uw.edu
- Hours: Monday-Friday 9AM-8PM, Saturday 12PM-4PM

Student Activities Office (SAO)

- Location: HUB 232
- Phone: 206-543-2380
- Email: sao@uw.edu
- Hours: Monday-Friday 9AM-6PM

HUB Event Services

- Location: HUB 117/Main Desk
- Phone: 206-616-8191
- Email: hubres@uw.edu
- Hours: HUB hours of operation