

EFFECTIVE
STUDENT ORGANIZATION
TRANSITION PRACTICE

Starting off: What out-going officers need to think about
You have a responsibility to the organization...

- Leaving things better than the way you found them
- Who wants to reinvent the wheel?
- Want to minimize confusion
- START EARLY



Review the Year:

- Review the group's goals for the previous year.
- Review programs and activities.
- Review membership.
- Review officers and organizational structure.
- Review organizational operation.
- Review advisor involvement.

What will your legacy be?

- Currently, 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?
- Your successes and challenges as an officer in the organization
- Personal goals for the organization and where things currently stand
- Suggestions for goals the new officers should work toward
- The professional relationship between the officer and advisors – what should new officers expect of the advisor

Topics to Discuss:

- 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
- Where the outgoing officer can be reached in the future (in case more questions arise)

First Steps:

- Provide an opportunity for informal socializing (perhaps provide refreshments)
- Create check lists
- Goal setting

Possible Items to Pass On:

- Organization's Constitution and Bylaws
- Goals/strategic plans/vision of the organization
- Current list of members and their contact information
- Advisor information
- Any documents such as agendas, letters, and memos

- Best if you can provide a CD/Flash Drive with these documents so the next officer/advisor can save to their computer and edit.
- Financial documents including budget, bank information, checkbook, etc.
- Update information to the new officers
- Any technology needs
- Frequently Asked Questions

Student Organization Advisor Brown Bag

Effective Organization Transitioning

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EXPECTATIONS



- Elements of a successful program
- Facilitating a successful program
- Worksheets
- Q & A

Incoming Officers



- First Steps
 - Provide an opportunity for informal socializing (perhaps provide refreshments)
 - Create check lists
 - Goal setting

KEEP RECORDS EARLY & ORGANIZE



- Keep everything!
- Purchase Orders
- Program Registration forms
- Funding Requests
- Food Menus (Price Lists)
- Room Reservations
- Officer Lists
- Retreat Material
- MAKE DUPLICATES (relevant officers)

Outgoing Officers



- Reviews of:
 - **the group's goals for the previous year**
 - **programs and activities**
 - **membership**
 - **officers and organizational structure**
 - **organizational operation**
 - **advisor involvement**

UPDATE DOCUMENTS



- Outdated constitutions
- Officer responsibilities
- Program registration
- Available funding
- Campus Policies and Rules

Incoming & outgoing officers



- Topics to discuss
 - 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
 - What they wish they knew
 - Where the outgoing officer can be reached in the future

Incoming & outgoing officers



- Items to pass on
 - Organization's Constitution and Bylaws
 - Goals/strategic plans/vision of the organization
 - Current list of members and their contact information
 - Advisor information
 - Any documents such as agendas, letters, and memos
 - Best if you can provide a CD/Flash Drive with these documents so the next officer/advisor can save to their computer and edit.
 - Financial documents including budget, bank information, checkbook, etc.
 - Update information to the new officers
 - Any technology needs
 - Frequently Asked Questions

Incoming & outgoing officers



- Worksheets
 - Reflective Questions
 - Maintaining continuity
 - Opportunity for innovation

50 Ways to Give Recognition to Volunteers

- ◆ Smile
- ◆ Put up a volunteer suggestion box
- ◆ Treat to a soda
- ◆ Ask for a report
- ◆ Send a birthday card
- ◆ Arrange for discounts
- ◆ Give service stripes
- ◆ Treat to ice cream
- ◆ Plan annual ceremony occasions
- ◆ Recognize personal needs and problems
- ◆ Be pleasant
- ◆ Post honor roll in reception area
- ◆ Respect their wishes
- ◆ Give informal socials
- ◆ Keep challenging them
- ◆ Send a Thanksgiving card to the person's family
- ◆ Say "Good Morning"
- ◆ Greet by name
- ◆ Provide a pre-service training
- ◆ Help develop self confidence
- ◆ Award plaques to sponsoring group
- ◆ Take time to explain fully
- ◆ Be verbal
- ◆ Give additional responsibility
- ◆ Afford participation in team planning
- ◆ Respect sensitivities
- ◆ Enable to grow on the job
- ◆ Send newsworthy information to the media
- ◆ Say "Good Afternoon"
- ◆ Honor their preferences
- ◆ Create pleasant surroundings
- ◆ Welcome them to staff meals
- ◆ Have a public reception
- ◆ Take time to talk
- ◆ Defend against hostile or negative staff
- ◆ Make good plans
- ◆ Throw a pizza party
- ◆ Plan a theater party
- ◆ Recommend to prospective employer
- ◆ Utilize as consultants
- ◆ Praise them to their friends
- ◆ Say "Thank you"
- ◆ Smile
- ◆ Be a real person
- ◆ Plan occasional extravaganzas
- ◆ Send impromptu fun cards
- ◆ Attend a sports event
- ◆ Have a picnic

From Schreiber, V. and Pflieger, E. "Supervising vs. Advising", UMR-ACUHO, 1999

Advisor/Student Evaluation and Feedback Tool

Please take 15-20 minutes to share your thoughts on the questions and statements listed below. Your feedback is valuable to my professional development.

Please use a scale of 5-1 to rate your answers, 5 being the best score.

1) I am satisfied with the amount of time our advisor spends with our group 5 4 3 2 1

Comments:

2) I am satisfied with the quality of time our advisor spends with our group 5 4 3 2 1

Comments:

3) I am satisfied with the amount of information our advisor shares with our group 5 4 3 2 1

Comments:

4) I am satisfied with the quality of information our advisor shares with our group 5 4 3 2 1

Comments:

5) Our advisor is familiar with the goals of our group 5 4 3 2 1

Comments:

6) Our advisor advises our group in a way consistent with our goals 5 4 3 2 1

Comments:

7) Our advisor adjusts his/her advising style to meet our needs 5 4 3 2 1

Comments:

8) Our advisor is a good listener 5 4 3 2 1

Comments:

9) Our advisor understands the dynamics of our group 5 4 3 2 1

Comments:

10) Our advisor role models balance and healthy living 5 4 3 2 1

Comments:

11) Our advisor challenges me to think 5 4 3 2 1

Comments:

12) Our advisor allows me room to make and execute decisions 5 4 3 2 1

Comments:

Additional Comments (use the back of this sheet if necessary):

Resource provided by Jon Kapell, Associate Director of Campus Activities, Drexell University

Advisor's Self-Evaluation Checklist

Please answer the following questions as they relate to your role as a student organization advisor. Fill in the blanks in front of each question using the following scale:

5 = all the time 4 = most of the time 3 = some of the time 2 = almost never 1 = never

- _____ I actively provide motivation and encouragement to members.
- _____ I know the goals of the organization.
- _____ I know the group's members.
- _____ I attend regularly scheduled executive board meetings.
- _____ I attend regularly scheduled organizational meetings.
- _____ I meet regularly with the officers of the organization.
- _____ I attend the organization's special events.
- _____ I assist with the orientation and training of new officers.
- _____ I help provide continuity for the organization.
- _____ I confront the negative behavior of members.
- _____ I understand the principles of group development.
- _____ I understand how students grow and learn.
- _____ I understand the principles that lead to orderly meetings.
- _____ I have read the group's constitution and by-laws.
- _____ I recommend and encourage without imposing my ideas and preferences.
- _____ I monitor the organization's financial records.
- _____ I understand the principles of good fund raising.
- _____ I understand how the issues of diversity affect the organization.
- _____ I attend conferences with the organization's members.
- _____ I know the steps to follow in developing a program.
- _____ I can identify what members have learned by participating in the organization.
- _____ I know where to find assistance when I encounter problems I cannot solve.