

# Officer Training and Transition Guide

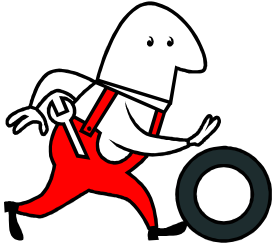
Student Organization Handbook  
Southeast Missouri State University

## Table of Contents

Introduction	2
Hosting a Formal Training & Transition	4
Outgoing Officer's Guide	8
Incoming Officer's Guide	14
Strategic Planning	23
Advisor's Guide	26
Tool's	28

## Introduction

Does it seem like every officer is re-inventing the wheel each year? Does your officer transition include passing someone a box of materials and a hardy wish of “good luck?” Student organizations undergo constant change. One of the greatest changes a student organization faces is the transitioning of new officers. These new lifestyles as officers can often be very overwhelming and confusing, but also the most critical and vulnerable moments. Two of the most important legacies you can leave student organizations with are continuity and smooth transition to a new leadership.



Officer training and transition are some of the most important responsibilities of a student organization and is usually a process that is not complete. An effective leadership training and transition requires time, attention and communication. There are many reasons as to why training and transition are important:

- Allows for closure for the outgoing officers
- Successfully recruits and retains new officers
- Educates new officers regarding organization policies and procedures
- Creates a cohesive group
- Minimizes the loss of momentum and accomplishments of the group
- Increases knowledge and confidence of the new leadership
- Educates new officers on areas and skills pertinent to their office
- Prepares new officers to take on the challenges of their duties and responsibilities successfully and without hesitation

It is important to note officer training and officer transition are not the same. Officer transition is the passing of information, records, suggestions, and responsibilities from outgoing to newly-elected officers. Officer transition provides newly-elected officers with the basic tools needed to do the job. It is through training that they gain the education and skills to do the job effectively.

### *Officer Transition*

- Transfer of records and supplies
- Transfer of knowledge
- Transfer of responsibility

### *Officer Training*

- Education about the organization
- Education on the position
- Learning organization-based skills
- Learning position-based skills

While outgoing officers may be tired and ready to “pass the torch” at the end of their term, it is necessary to take the time to complete a thorough officer training and transition process for newly elected officers. Without completing this process many student leaders in new positions feel lost and do not understand their duties/responsibilities, and as a consequence, the entire organization suffers.

An officer transition meeting/retreat can be:

- A meeting between the newly-elected and outgoing officers, one on one
- A meeting with the newly-elected and outgoing officers, all together
- A retreat during which the newly-elected and outgoing officers meet for one day (or just a morning or afternoon), while the newly-elected officers meet for a second day to brainstorm goals \*\*\**most effective*

## Officer Training and Transition Guide

The *Officer Training and Transition Manual* is designed as a step-by-step tool to assist your student organization in creating a formalized transition and training process for officers. This manual should provide the process and resources to assist outgoing officers in their planning and implementation of a strong officer training program and allow the newly incoming officers to feel more comfortable and better prepared while coming into this position.

*Hosting a Formal Training and Transition Workshop* (see page 4) is a sample agenda that can be used while preparing for your training and transitioning meeting. This agenda breaks down a very detailed outline to ensure the meeting will flow as smoothly as possible.

The next section is dedicated to the outgoing officers. The *Outgoing Officer* (see page 8) section has a very useful officer to-do list, transition worksheet and more.

Following, there is the *Incoming Officer Guide* (see page 14). This section can be very helpful if you are unsure on how to do various things on campus such as reserving a space on campus in the “How To” section of the manual; it also contains a transition worksheet and a step-by-step guide for new officers.

The *Advisor’s Guide* (see page 26) is a section of the manual that has information for Advisor’s on what to discuss with the outgoing and incoming officers, a checklist, a sample contract, etc.

Lastly, is the *Tools* section (see page 28). This section will contain useful tools for new officers such as the *Student Organization Officer Update Form* (see page 40) and a sample letter to send to your bank to change the officer name(s) on the account.

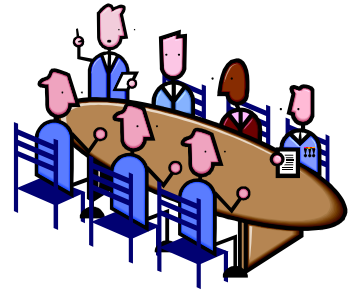
Campus Life & Event Services wishes the best of luck to all the newly elected officers. Please feel free to contact us if you require any assistance with your student organization’s upcoming officer transition and training.

Adapted from:

Office of Student Life. (2009). *Student organization officer training and transition manual*. Syracuse, NY: Syracuse University. Retrieved December 7, 2009 from <http://studentlife.syr.edu/documents/2009/1/27/OfficerTransitionAndTraining.doc>

## Hosting a Formal Training and Transition Workshop

As your year as an officer is coming to an end, it is important to meet with the newly elected officers before they begin their term. A transition meeting is necessary for new officers to learn about the position experience and to receive advice and tips from the outgoing officer. This transition meeting should be a casual and open time for the outgoing officer to provide honest feedback for the newly elected officer and evaluate the accomplishments and obstacles of the previous year.



### When:

- Complete AFTER new officer elections and BEFORE finals
  - Provide at least two to three weeks notice for all officers and advisor(s)
- Workshop to last at least two hours, four is better

### Who Attends:

- ALL incoming officers
- ALL outgoing officers
- Advisor(s), if possible

### Facilitators:

- Outgoing President
- Advisor(s), if possible
- Campus Life and Event Services staff members are also available to assist

### Purpose/Goals:

- To ensure the strength and continuity of student organization leadership
- To build trust and teamwork among incoming leaders
- To develop specific goals and a plan for achieving those goals for the upcoming semester or year
- To offer outgoing officers the opportunity to share their experience and advice to new officers

The following outline can help make your training and transition meeting flows as smoothly as possible. The sample agenda below is for a two-hour session, however, four hours is more effective and allows for more discussion and planning time.

### I. Welcome and Introductions (20 minutes)

#### a. Help participants to get acquainted (15 minutes)

- i. Conduct at least one ice breaker or teambuilder even if officers are already familiar with one another. Working together as a team requires a higher level of knowledge of the other person than a typical acquaintanceship or even friendship.
  1. True Colors is a leadership style assessment that can assist your team in learning about one another's leadership traits (see page 32).
  2. The Leadership Library in the Center for Student Involvement (UC 204) has several ice breaker and teambuilding books you can utilize.
- ii. If time permits, having incoming officers complete a leadership-style inventory to help them understand one another's leadership traits and how they can work best together. This is a valuable tool even if completed at a later date. There is a leadership-style inventory that can be used and is located in the Tools section.

1. The Coordinator for Leadership Development can assist you with finding a tool appropriate for your organization (UC 202, [leadership@semo.edu](mailto:leadership@semo.edu), 573.651.2280).

### **b. Explain the purpose of the meeting (5 minutes)**

- i. Help outgoing and incoming officers to understand why formal transition and training is important. If you need some help for discussion tips check out page 2 of this manual for some assistance.
- ii. Provide participants an overview of the day and timeline of how long each component of transition and training will take.

## **II. The Year in Review (40 minutes)**

### **a. Programs and activities**

- i. Evaluate each event/program/activity the organization completed during the year. Be sure to answer the following:
  1. How effective were the events/programs/activities we sponsored?
  2. How well did we market the event to the campus (and public)?
  3. Were our programs consistent with the goals/mission of the organization?
  4. Did our events/programs/activities have a good attendance (if not, why)?
  5. Did we have a good balance of different kinds of programs?
  6. Which events/programs/activities should be continued and which should be dropped?
- ii. Event Reports can be completed after each event/program/activity throughout the year to assist with this process. Visit the *Tools* section in this manual for a *Sample Event Report* form (see page 29).

### **b. Membership review**

- i. How many members are involved in this organization?
- ii. Do we currently have just enough, too few, or too many members (in light of the group's goals)?
- iii. How effective were our membership recruitment efforts?
- iv. Are our members as actively involved as we want them to be?
- v. Are our members actively involved in the operations of the organization (including decision making, planning, implementing, and evaluating)?
- vi. Are members enthusiastic about the group's activities and motivated to work towards the group's goals?
- vii. Were there adequate opportunities for members to get involved in responsible and meaningful ways?
- viii. How do we recruit and retain new members?

### **c. Officers and organization structure**

- i. Are officer roles and responsibilities clearly described? Do officers understand their responsibilities and roles within the organizational structure?
- ii. Do we need to re-evaluate any responsibilities or add new positions?
- iii. Did the officers operate as a team or could cooperation between officers be improved? How would the officers evaluate the effectiveness of the group as a whole? What could be improved?
  1. The Coordinator for Leadership Development can assist you with teamwork development (UC 202, [leadership@semo.edu](mailto:leadership@semo.edu), 573.651.2280).
- iv. Is the amount of time and effort required of each officer equal, or are some expected to work harder than others? Do officers have a committee with whom they work? How often do organization officers meet as a group?

- v. Are the officers "in tune" with the membership? Is there two-way communication (and understanding of members' needs and talents)? How would the general membership evaluate the effectiveness of the officers? Have the members evaluate the executive board to find out if the officers are "in tune."
- d. Organizational operations**
  - i. What was the budget allocation for the organization?
  - ii. Were the finances adequate for the group's activities?
  - iii. Was the budget managed properly?
  - iv. Was the frequency of meetings appropriate?
  - v. Were meetings run effectively?
  - vi. Do we have a committee structure? If so, is it working? If not, is it needed?
  - vii. Do we experience scheduling conflicts with other groups or activities?
- e. Advisor involvement**
  - i. What is the role of our organization advisor(s)?
  - ii. Did our advisor(s) provide the support we needed?
  - iii. Did we give our advisor(s) a chance to get involved?
  - iv. What type of interaction do we have with our advisor(s)?
  - v. What changes would we like to see in regards to the organizations' relationship with their advisor(s)?
  - vi. You may wish to utilize an *Advisor Contract* to help you clarify the expectations and responsibilities of the role for the student organization and yourself. Please visit the *Tools* section on page 29 for a sample.
- f. Public image**
  - i. How do other groups perceive our organization?
  - ii. How do we see ourselves?
  - iii. What can our organization do to enhance our image on campus?
- g. SWOT (Strengths, Weaknesses, Opportunity, Threats) analysis**
  - i. What are the current strengths of the organization?
  - ii. What are the current weaknesses of the organization?
  - iii. What are areas of opportunity for the organization?
  - iv. What are threats to the organization?

### III. Officer Transition (30 minutes)

Have the new and outgoing officers meet individually to discuss the following:

- a. Responsibilities of the position, with a job description and time commitment
- b. A timetable for completion of annual duties
- c. Unfinished projects or ideas for new changes
- d. Important contacts and resource persons (introduce new officer to these people if possible)
- e. Advice for new officer
- f. Answer any questions new officer may have
- g. Where the outgoing officer can be reached with future questions from new officer

*\*\*\*Use the Outgoing and Incoming Officer Guides (see pages 13 and 16) that follow to help old and new officers think about the topics listed above.*

### IV. Goal setting (20 minutes)

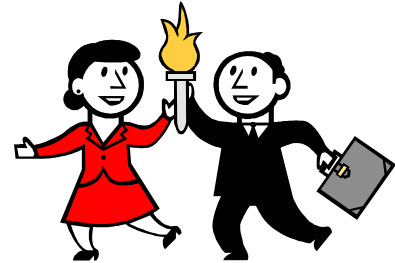
- a. Review the organization's goals and mission for the previous year.
  - i. What did we hope to accomplish?

## Officer Training and Transition Guide

- ii. How well did we do on each goal?
    1. What goals were we most successful in accomplishing?
    2. What goals were we less successful in accomplishing?
  - iii. What goals should be continued, altered, added, or abandoned?
- b. See pages 24-26 for information on *Strategic Planning* and *Goal Setting*.

### V. Wrap-Up (10 minutes)

- a. If possible, have a semi-formal ceremony to “pass the torch” to the new officers and introduce them to the organization. Provide an opportunity for informal socializing within your organization.



Adapted from:

Delta Gamma Fraternity. (2009). *Changing of the tides: Slating, election, and transition*. Columbus, OH: Delta Gamma Fraternity.

McIntire Student Services. (2009). *Hints for student organization officer transition*. Charlottesville, VA: University of Virginia. Retrieved December 7, 2009 from <http://www.commerce.virginia.edu/studentlife/student/studentorgs/pages/transitionhints.aspx>

Office of Student Activities and Leadership. (unknown). *Student organization officer transition guide*. Norfolk, VA: Old Dominion University. Retrieved December 7, 2009 from <http://studentaffairs.odu.edu/osal/form/studentorganizations/officertransition.pdf>

Office of Student Engagement. (2009). *Planning an office transition training*. Springfield, MO: Missouri State University. Retrieved December 7, 2009 from [http://organizations.missouristate.edu/assets/activities/sample\\_transition\\_training\\_agenda.doc](http://organizations.missouristate.edu/assets/activities/sample_transition_training_agenda.doc)

Office of Student Life. (2009). *Student organization officer training and transition manual*. Syracuse, NY: Syracuse University. Retrieved December 7, 2009 from <http://studentlife.syr.edu/documents/2009/1/27/OfficerTransitionAndTraining.doc>

Wichita State University. (1992). *Student organizations' handbook*. Wichita, KS: Wichita State University.

# Outgoing Officer Guide

Officer Training and Transition Guide  
Southeast Missouri State University

## Table of Contents

Before Leaving Office	9
Outgoing Officer To-Do List	10
Compile Resources: Binders, Files, Notebooks	11
Outgoing Officer's Transition Worksheet	13



## Before Leaving Office

**In order to look forward...begin thinking NOW!**

**Recruit Officers:** Begin early in the year to identify who would be a good fit for the officer position. Think about the leadership talents and skills of current members and how they could benefit the organization. Encourage specific individuals through personalized contact to consider running for an officer position.

**Elections:** Hold elections a month or two before current officers' transition out and new officers' step into their roles. Be sure the election process is kept formal and request a resume/platform/activity sheet from possible candidates. Encourage current executive board members to be present during all officer elections.

**Shadow Process:** Once new officers are elected, begin a shadowing process with them and the officer whom he or she will be replacing. Introduce new officers to key people. Be sure they are familiar with the organization's goals, mission, constitution, by-laws and advisor(s).

**Position Binder:** Each officer position should have a notebook/binder of important information relevant to his or her position. The notebook should contain materials and documents used throughout the year. Make sure this notebook/binder is up-to-date for the newly elected officer to have.

**Finishing what you started:** Try to finish reports, minor duties or activities, etc. that may be due soon before or right after the newly elected officers are installed.

**Utilize the *Officer Training and Transition Guide*:** Be sure to meet one-on-one with new officer and go over the *Officer Training and Transition Guide* and position binder. Complete the outgoing and incoming assessment forms and go over answers and questions with newly elected officers. Allow time for newly elected officers to ask questions and to understand the duties of their new position.

Adapted from:

Office of Student Life. (2009). *Student organization officer training and transition manual*. Syracuse, NY: Syracuse University. Retrieved December 7, 2009 from <http://studentlife.syr.edu/documents/2009/1/27/OfficerTransitionAndTraining.doc>

Triangle Fraternity. (1998). *Officer transition and training guide*. Plainfield, IN: Triangle Fraternity. Retrieved December 7, 2009 from [www.triangle.org/docs/Resources/transition.pdf](http://www.triangle.org/docs/Resources/transition.pdf)

## Outgoing Officer To-Do List

- Organize all notebooks and files
  - \*See next page for a suggestion of what to include*
- Finish all necessary correspondence (letters, e-mail, and phone calls)
- Update new officer information on roster and give to advisor
- Prepare year-end report and evaluation
- Develop action plan and timeline for new officer transition
  - Including, but not limited to:
    - 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’s Transition Worksheet” (see page 13)
- Transfer keys, passwords, bank account access
  - Financial accounts
    - Compose a letter on letterhead, if available, indicating a change in officers has occurred. Indicate who no longer has the authority to sign financial documents and who now has this authority. Be sure to include the first and last name, phone number, and address of all new individuals. An example of a letter has been attached in the *Tools* section (see page 31).\*
    - Take the letter to the bank and file new account signature cards. Many banks require all the individuals being removed from the account and all those being added be present at the same time.
      - \*In addition to a letter, some banks require a copy of the organization minutes indicating your group’s intention to change bank account access.
  - Keys for lock boxes, storage lockers, offices
    - If your organization has an office in the Center for Student Involvement, UC 204, the outgoing officers must RETURN THE KEYS in person to Event Services & Scheduling, UC 413. The incoming officers must then go to Event Services & Scheduling to sign key-checkout paperwork and get their own keys.
    - If your organization has a storage locker through Campus Life & Event Services contact Dale Chronister (UC 202, [dchronister@semo.edu](mailto:dchronister@semo.edu), 573.651.2280) and notify him who now has the keys.



## Compile Resources: Binders, Files, Notebooks

Each incoming officer should be provided with an organized binder of electronic and hard copy paper files. Give your predecessor a tour of the binder, don't just pass it off.

- Introduction
  - Table of contents
  - Important names and numbers (contact list)
  - Name and contact information of outgoing officer
  - Resource list
    - Advisor contact information
    - National headquarters information
    - Passwords, login information, if applicable for website(s), e-mail accounts, mailbox number, codes, etc.
  - Organizational calendar
    - List dates that are already set for the upcoming year, or when major events typically occur
  - Organization goals, both met and unmet
- Governing documents
  - Organization mission statement
  - Organization constitution and by-laws
  - Organization policies and procedures
  - National organization's mission/vision statements, constitution and bylaws, and policies and procedures, if applicable
  - Governing organization's constitution and by-laws, if applicable (NIC, PHC, NPHC, etc.)
  - Registered Student Organization Handbook,  
<http://www.semo.edu/leadership/studentorgs/resources.htm>
- Officer position descriptions and responsibilities
  - List specific duties of the positions
  - List any changes or suggestions for the position description
  - Position goals, both met and unmet
  - Unfinished projects list
    - Are room reservations made for next year?
    - Is there any forms/paperwork that needs to be submitted to Campus Life & Event Services or your National organization?
  - Position timeline
    - Year-long calendar that indicated when the outgoing office completed each task
    - Recommend deadlines by which tasks should be completed to best fulfill responsibilities
  - Procedures – the “how to’s”
    - Copies of important forms
    - How to register as a student organization,  
<http://www.semo.edu/leadership/studentorgs/resources.htm>
    - How to reserve a room on campus,  
<http://www.semo.edu/leadership/studentorgs/resources.htm>
- Membership information

## Officer Training and Transition Guide

- List of members and contact information
- List of people expressing interest, but have not joined yet
- Committee roster
- Agendas and meeting minutes
- Committee reports
- Event Reports
  - Provide information on how each program/event/activity was implemented, including any relevant files or copies, i.e. programs
  - For an *Event Report* form see the *Tools* section in the manual (see page 29).
- Budget information
- Year-end reports and evaluation

### Other items:

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### Adapted from:

- Office of Student Activities and Leadership. (unknown). *Student organization officer transition guide*. Norfolk, VA: Old Dominion University. Retrieved December 7, 2009 from <http://studentaffairs.odu.edu/osal/form/studentorganizations/officertransition.pdf>
- Office of Student Engagement. (2009). *Planning an office transition training*. Springfield, MO: Missouri State University. Retrieved December 7, 2009 from [http://studentorganizations.missouristate.edu/assets/activities/Officer\\_Notebook.doc](http://studentorganizations.missouristate.edu/assets/activities/Officer_Notebook.doc)
- Office of Student Life. (2009). *Student organization officer training and transition manual*. Syracuse, NY: Syracuse University. Retrieved December 7, 2009 from <http://studentlife.syr.edu/documents/2009/1/27/OfficerTransitionAndTraining.doc>
- Office of Student Life. (2009). *Leadership transition handbook*. Allendale, MI: Grand Valley State University. Retrieved December 7, 2009 from [http://www.gvsu.edu/cms3/assets/0625A720-00AA-09A2-4C62ED3DA35C8A9B/sacouncil/Leader%20Transition%20Handbook%20\(03.16.09\).pdf](http://www.gvsu.edu/cms3/assets/0625A720-00AA-09A2-4C62ED3DA35C8A9B/sacouncil/Leader%20Transition%20Handbook%20(03.16.09).pdf)
- Student Life and Leadership. (2009). *Passing the baton: Student organization officer transition*. San Diego, CA: San Diego State University. Retrieved December 7, 2009 from <http://sll.sdsu.edu/studentorgs/dev-pass-baton.html>

## Outgoing Officer's Transition Worksheet

[Complete the following BEFORE transition meetings and training session.]

Name of outgoing officer:

Position:

Date:

List three things during your term in office that were considered most important.

List three things you wish you had done during your term in office but were unable to accomplish.

List specific accomplishments realized during your term in office and the reasons for their successes.

List any problems or disappointments you encountered as part of your office and suggest ways of avoiding or correcting them.

List any obstacles you encountered that negatively affected your ability to perform your position effectively.

List "lessons learned" or things you wish you had known prior to starting the position.

List supplemental materials and sources of information you found most helpful. Include specific resources and people.

List any outstanding items that still need completion prior to your leaving office.

Adapted from:

Delta Gamma Fraternity. (2009). *Changing of the Tides: Slating, Election, and Transition*. Columbus, OH: Delta Gamma Fraternity.

North-American Interfraternity Conference. (unknown). *Retreat workbook*. Indianapolis, IN: North-American Interfraternity Conference.

Office of Student Activities and Leadership. (unknown). *Student organization officer transition guide*. Norfolk, VA: Old Dominion University. Retrieved December 7, 2009 from <http://studentaffairs.odu.edu/osal/form/studentorganizations/officetransition.pdf>

Office of Student Life. (2009). *Student organization officer training and transition manual*. Syracuse, NY: Syracuse University. Retrieved December 7, 2009 from <http://studentlife.syr.edu/documents/2009/1/27/OfficerTransitionAndTraining.doc>

# Incoming Officer Guide

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Southeast Missouri State University

## Table of Contents

Your Role as a Student Leader	15
Incoming Officer's Transition Worksheet	16
A Step-by-Step Guide for New Officers	17
How To's for New Officers	20
Strategic Planning	23
Goal Setting	24

## Your Role as a Student Leader

1. **Learn and understand your responsibilities and expectations as an officer in your organization.**
2. **Read through and familiarize yourself with the Student Organization Handbook** at <http://www.semo.edu/leadership/studentorgs/resources.htm>
3. **Familiarize yourself with the organization advisor.** Your advisor will be a constant contact for you and your organization throughout the year; be sure to have a clear understanding of his or her role and duties to your organization. Consider completing an *Advisor Contract*, see *Tools* section on page 29.
4. **Work on the morale of your group members.** Unless they feel good about their roles, your group members will not be as cooperative and productive as they can be.
5. **Promote group cohesiveness.** Ensure that all officers work well together and that organization members feel as though they belong and are important to the organization.
6. **Let your organization members determine the organization's purpose.**
7. **Be sure your organization has a common purpose.** Structure meetings so that issues of common interest are discussed with the entire organization, and individual concerns are addressed at other times.
8. **Share decision making regarding policies and procedures.** By emphasizing how to solve problems, and involving your members in these decisions, you will create deeper commitment in your members.
9. **Emphasize the process for working through problems rather than the final result.** Your desired results may change as your organization changes. An open channel of communication which involves all organization members will help you incorporate these changes.
10. **Encourage brainstorming and creativity.** Provide feedback and support for new ideas and avoid penalizing for mistakes made for the sake of experimentation.
11. **Expect any changes to be accepted gradually.** Sometimes we expect people to accept changes overnight that we have been thinking about for months. Remember that it is almost impossible to change people, they usually must change themselves.
12. **Have faith and confidence in the ability of your organization.** Enjoy serving as an officer in your group and understand the mission statement for your organization.
13. **Share the glory.** You cannot expect enthusiastic people participation if you take all the credit.
14. **Be open to collaborating programs/activities with other student organizations.** Branch out to other organizations, perhaps with common mission statements and goals, to collaborate on events for campus.
15. **Be specific.** Communicate exactly what you expect and think.
16. **Be impartial.** Play no favorites and give all group members equal chance to participate.
17. **Manage conflict, do not ignore it.** Bring conflict into the open and concentrate on issues, behaviors, and facts rather than personalities.

Adapted from:

Office of Student Activities and Leadership. (unknown). *Student organization officer transition guide*. Norfolk, VA: Old Dominion University. Retrieved December 7, 2009 from <http://studentaffairs.odu.edu/osal/form/studentorganizations/officertransition.pdf>

Office of Student Life. (2009). *Student organization officer training and transition manual*. Syracuse, NY: Syracuse University. Retrieved December 7, 2009 from <http://studentlife.syr.edu/documents/2009/1/27/OfficerTransitionAndTraining.doc>

Wichita State University. (1992). *Student organizations' handbook*. Wichita, KS: Wichita State University.

## Incoming Officer's Transition Worksheet

After you meet with the outgoing officer in your new position, think through and respond to the following questions regarding your responsibilities to help you prepare for the upcoming year.

Name of outgoing officer:

Name of incoming officer:

Position:

Date:

List three things that made you want to run for this position and why.

List three new ideas you would like to implement for your office this year.

List three areas in which you foresee possible problems in your office.

List possible solutions to the above three problems.

List tasks you should complete over the summer or winter breaks.

List people (positions) you should get to know better in order to be most successful in your position.

List resources or services you need to learn more about in order to be most successful in your position.

List other questions you need answered in order to be most successful in your position.

Adapted from:

Delta Gamma Fraternity. (2009). *Changing of the Tides: Slating, Election, and Transition*. Columbus, OH: Delta Gamma Fraternity.

Office of Student Activities and Leadership. (unknown). *Student organization officer transition guide*. Norfolk, VA: Old Dominion University. Retrieved December 7, 2009 from <http://studentaffairs.odu.edu/osal/form/studentorganizations/officertransition.pdf>



## A Step-by-Step Guide for New Officers

### BEFORE STEPPING INTO OFFICE

#### Review role/responsibilities of the position

- Don't accept a position unless you fully understand the responsibilities and have appropriate time to commit.
- You may not completely understand everything until well into your term, but accepting a position without first reviewing the job description is asking for failure.

#### Discuss the position with the outgoing officer

- Ask the current officer his or her perspective on the position and the factors he or she faced in getting the job done. Be sure you have the following questions answered:
  - The three most important or largest responsibilities associated with the position.
  - The amount of time necessary to complete those tasks.
  - The most difficult responsibilities of the job.
  - Factors making it difficult to complete tasks (lack of time and money, resistance from others, etc.).
  - The most rewarding accomplishments of the past year.
  - Goals they would set for themselves if they had the position for another year.
  - Things they would do differently.

### ONCE IN OFFICE

#### The First Week

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**Announce change of officers:** *You've just been elected, send out the good news!*



- Distribute correspondence announcing the election of new officers, particularly the executive positions. Complete appropriate paperwork, if applicable.

#### *To the Organization*

- \_\_\_ National/International Headquarters, submit appropriate paperwork, if applicable
- \_\_\_ Division/Regional Director, if applicable
- \_\_\_ All advisors

#### *To the Campus*

- \_\_\_ Complete a *Student Organization Officer Update Form* and submit it to Campus Life & Event Services, UC 202, MS 1200. The form is located in the *Tools* section (see page 40).
- \_\_\_ If Greek organization, please complete the Chapter Officer Listing online form for Assistant Director of Fraternities & Sororities, <http://semogreeks.com/chapter-officer-listing>
- \_\_\_ If academic organization, notify the department chair
- \_\_\_ If a Sport Club, notify Recreation Services

### Change names on accounts

- Financial accounts
  - Compose a letter on letterhead, if available, indicating a change in officers has occurred. Indicate who no longer has the authority to sign financial documents and who now has this authority. Be sure to include the first and last name, phone number, and address of all new individuals. An example of a letter has been attached in the *Tools* section (see page 31).\*
  - Take the letter to the bank and file new account signature cards. Many banks require all the individuals being removed from the account and all those being added be present at the same time.
    - \*In addition to a letter, some banks require a copy of the organization minutes indicating your group's intention to change bank account access.
- Keys for lock boxes, storage lockers, offices
  - If your organization has an office in the Center for Student Involvement, UC 204, the outgoing officers must RETURN THE KEYS in person to Event Services & Scheduling, UC 413. The incoming officers must then go to Event Services & Scheduling to sign key checkout paperwork and get their own keys.
  - If your organization has a storage locker through Campus Life & Event Services contact Dale Chronister, (UC 202, [dchronister@semo.edu](mailto:dchronister@semo.edu), 573.651.2280) and notify him who now has the keys.

### Obtain updated officer manual

- If you are unable to have a one-on-one meeting with the outgoing officer, get the officer manual as soon as possible. Be sure YOU are in possession of the manual during your first week in office, even if it's not updated.

## The Second Week

---

### Meet with other newly-elected officers as a group

- The primary focus of this meeting is two-fold: one, to ensure that each new officer has obtained the necessary officer manuals and records and two, to schedule and begin planning a more detailed officers' workshop.

### Review all records and resources documents

- Review the officer manual for your position and be sure you have a copy of and understand the following documents:
  - Organization mission/vision statements
  - Organization constitution and by-laws
  - Organization policies and procedures
  - National organization's mission/vision statements, constitution and by-laws, and policies and procedures, if applicable
  - Governing organization's constitution and by-laws, if applicable (NIC, PHC, NPHC, etc.)
  - Registered Student Organization Handbook, <http://www.semo.edu/leadership/studentorgs/resources.htm>
  - Resource list
  - Important names and numbers (contact list)

## Officer Training and Transition Guide

- Name and contact information of outgoing officer
  - Officer job descriptions and responsibilities
  - Budget information
  - Year-end reports and evaluations
  - Important forms
  - Organizational calendar
  - Agendas and meeting minutes
  - Committee reports
  - Organization goals, both met and unmet
  - Position goals, both met and unmet
  - Unfinished projects list
- As you conduct your review, prepare a list of questions you will want to ask the outgoing officer about the mechanisms (operating practices) in place to assist you complete these duties.
  - Look for information about responsibilities the previous officer took on but are not listed as specific duties of the position. Did the past officer take on responsibility for duties that others should have completed?

### Meet with the outgoing officer again

- By this point in the transition, you should have additional questions for the outgoing officer. Along with the questions noted in reviewing the records and resources you have received, discuss with them your assessment of the organization and upcoming meetings, as well as suggestions they might have.

### Meet with the advisor(s)

- Become acquainted with your student organization advisor(s). Your advisor will serve as a guide during your term in office.
- Gain his or her perspective on the important responsibilities of your position.
- Ask the advisor(s) to brainstorm a vision and corresponding goals for the organization for the next year.

## During the First Month

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### Establish goals

- What is the vision for the organization? How do the responsibilities for your position fall within that vision? What can you do in your position to help make that vision come to life?
- See pages 23-25 for information on *Strategic Planning* and *Goal Setting*.

## At Three Months

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### Review position and organizational goals

- Goals are only useful if they are constantly worked towards and evaluated. It is unlikely they will be achieved if you don't monitor your progress on an on-going basis.

Adapted from:

Triangle Fraternity. (1998). *Officer transition and training guide*. Plainfield, IN: Triangle Fraternity. Retrieved December 7, 2009 from [www.triangle.org/docs/Resources/transition.pdf](http://www.triangle.org/docs/Resources/transition.pdf)

## How To's For New Officers

Be sure to review the Student Organization Handbook for detailed information on the *Student Organization Registration Process, General Policies & Procedures, Funding & Finances, Event Planning & Promotion, Important Offices to Know, and Advisor Resources*. Visit <http://www.semo.edu/leadership/studentorgs/resources.htm> to download the handbook.

The following information serves as a *brief* guide to highlight important resources and policies.

### General Policies & Procedures

#### Evening Social Function Policy

If your organization is planning to host an event that begins or continues after 8 p.m. and/or you are inviting non-student guests or expecting over 100 students in attendance you must abide by the Evening Social Function Policy. The organization must fill out a Pre-Event Worksheet three weeks prior to the date of the event. For more information please visit <http://www4.semo.edu/uc/evenings.htm>.

#### Food and Beverage Policy

If your organization hosts an event on campus and you decide to have food for your guests, Chartwells must cater the event; this is due to contract stipulations with Chartwells Dining Services. This contract guarantees Chartwells the exclusive right to provide all services and catering at Southeast Missouri State University. Exceptions are made on a case by case basis. Requests can be made by submitting a "Request for Exception to Catering Exclusivity" form 10 days in advance to Event Services and Scheduling. To download the form, visit <http://www4.semo.edu/uc/docs/Catering.pdf>. If you are ordering food, Chartwells requires that you place your order two weeks prior to the event. To view a list of food and beverages as well as prices offered or to make a food reservation, please visit <https://semo.catertrax.com/>.

#### Gambling

If your organization is planning a raffle, bingo game, trivia, or other game of chance or skill for an upcoming fundraiser make sure it doesn't break the law. Did you know all of those could be considered gambling and are illegal in Missouri? Pick up *Fundraising* and *Gambling* brochures in the Center for Student Involvement, UC 204, or contact the Coordinator for Leadership Development, (UC 202, [leadership@semo.edu](mailto:leadership@semo.edu), 573.651.2280) to check on the legality of your event.

### Funding & Finance

#### Student Government Funding Board

Student Government Funding Board provides funding to student organizations planning events that are free and open to the entire campus community. For more information browse the Funding Board brochure on the Student Government website at <http://www2.semo.edu/studentgov/>

#### Dollars for Innovative Campus Events (D.I.C.E.) Funding

D.I.C.E. funding is available to students planning events that are free and open to the entire campus community and that occur after 5:00 p.m. between Thursday and Sunday evening. For more information

please visit <http://www.semo.edu/leadership/dice/index.htm> or contact Joanna Shaver, the Coordinator of Campus Programming, (UC 202, [jshaver@semo.edu](mailto:jshaver@semo.edu), 573.651.2280.)

### Event Planning & Promotion

#### Event Planning

If your organization needs some help with event planning this website is the place to go. It provides a step-by-step *Event Planning Worksheet*, where to choose a location/venue on campus, timing phase chart, promoting/marketing, as well as funding/budgeting. For more information please visit <http://www.semo.edu/leadership/studentorgs/resources.htm>.

#### Advertising on Campus

Advertising on campus can be a little hard at times trying to think outside the box and get creative ideas. There are many options available on campus. Your organization can advertise in the *Arrow*, hang banners in the University Center, place table tents at the cafeteria tables, chalk the sidewalks, paint on the power plant walls, post to the Portal calendar, advertise on KOMC-Rage or 103.7, etc. The list goes on and on. For more ideas visit “Advertising on Campus” in the *Event Planning & Promotion* section of the Student Organization Handbook: <http://www.semo.edu/leadership/studentorgs/resources.htm>.

#### Campus Life Event Calendar

The Campus Life Event Calendar is maintained by Campus Life & Event Services. The events can be viewed both web-based and through the Portal. The University Portal may be used to advertise for events open to all students being hosted by recognized student organizations. To post an event, go to <http://www4.semo.edu/campuslife/portal.htm> and enter the date, time, location, and description of your event.

### Important Offices to Know

#### Campus Life & Event Services

If your student organization is looking for resources, Campus Life & Event Services has it! We have information on how to recruit new members, group dynamics, motivation, delegation, conflict resolution, risk management and much more! Contact UC 202, [leadership@semo.edu](mailto:leadership@semo.edu), 573.651.2280 if you would like assistance with any of the previously mentioned topics and many more.

#### Center for Student Involvement (CSI)

The Center for Student Involvement is located on the second floor of the University Center (204). The Center for Student Involvement is jam packed with free useful resources and materials for your organization. There is a conference room available for reservation, a paper cutter, icebreaker and leadership resource library, laminating machine, Ellison Press that makes die cut letters for posters, butcher block paper, scanner, poster enlarger, and much more. The CSI also has a big screen TV and Nintendo® Wii™ game system for your entertainment. Check out the CSI today to see what they can offer to your organization. For more information, visit <http://www.semo.edu/leadership/csi.htm>.

#### Event Services & Scheduling

If you need to reserve a room for a meeting or a program that you plan on having in the future, Event Services and Scheduling is most likely the place to go! Student organizations receive FREE room reservations through Event Services and Scheduling, located on the 4th floor of the University Center (413). You can reserve rooms

## Officer Training and Transition Guide

in the University Center, Dempster Hall, Academic Terraces or Auditorium, and classrooms. To reserve a room, call 573.651.2282 or fill out a form online at <http://www4.semo.edu/uc/resform.asp>.

### Other Reservations

If you still have not found a room or place to host your event from Event Services and Scheduling, Recreational Services allows you to reserve the Student Recreation Center North or South, Intramural Fields, Sand Volleyball, etc. The Show Me Center has meeting rooms and the Arena available to reserve. To schedule a room or field from Recreation Services call 573.651.2105 or for the Show Me Center call 573.651.2297. There may be a charge associated with reserving a room in these spaces. Information about locations/venues on campus along with the maximum capacity can be found in the *Event Planning & Promotion* section of the Student Organization Handbook, <http://www.semo.edu/leadership/studentorgs/resources.htm>.

### Copy Services

Do you need to make copies of flyers for your event? The Center for Student Involvement can make 8.5"x11" or 8.5"x14" black and white copies for \$0.10/copy. You may also use the poster enlarger machine to increase the size of a black and white 8.5"x11" flyer. You receive two FREE posters per event; each additional copy is \$5.00.

For more elaborate copy needs, the Copy Center located in Parker Hall room 105 can make both regular copies and special orders. You can place your order via e-mail at [copycenter@semo.edu](mailto:copycenter@semo.edu) or by drop off. When placing your order please have the following information:

- Your name and phone number
- Organization name
- Event name and date
- Number of copies
- Type of copies (black, white, color, etc.)
- Color of paper
- Time and date of pick-up or delivery instructions
- Any special instructions (folding, stapling, etc.)

The Copy Center can also be reached at 573.651.2531 regarding any questions.

### Posting Policies

For a few helpful hints before posting anything on campus, please review Southeast Missouri State's posting policy. If your postings do not have the correct information on the flyer the postings will be removed, so make sure all information is on the flyer that is needed and posted in the correct spot on campus. To review the Posting Policy please visit the *Student Organization Resources* website, <http://www.semo.edu/leadership/studentorgs/resources.htm>.

## Strategic Planning

After new officers have been inducted, it's time for the executive board to develop a strategic plan for how you want the next year to play out. Strategic plans help organizations to understand their mission or purpose, determine what they want to accomplish and how they will do so. To develop a strategic plan requires two components:

1. Develop a vision for the next year
2. Develop goals that will lead to actualization of the vision

### Vision Statement

A *vision statement* “outlines what the organization wants to be, or how it wants the world in which it operates to be; it concentrates on the future; it is a source of inspiration; it provides clear decision-making criteria.”

Vision statements should be short, functional, and inspirational. Anyone who reads your vision statement should easily understand where you want the organization to be in a year.

#### *Samples*

- To educate Southeast Missouri State University students about issues of healthcare and wellness.
- To promote Redhawks spirit through student support of NCAA athletics.

Use the space provided to develop your vision for the upcoming year.

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Adapted from:  
Wikipedia. (2009). *Strategic planning*. Wikimedia Foundation, Inc. Retrieved December 15, 2009 from [http://en.wikipedia.org/wiki/Strategic\\_planning](http://en.wikipedia.org/wiki/Strategic_planning)

## Goal Setting

### What are goals?

- A desired future condition.
- Expressed in either quantitative or qualitative terms.
- Measurable outcomes of organization's activity.

### Why are goals important?

- Goals are guides for action; it is through group goals that the efforts of group members are planned and coordinated.
- Conflicts among members are resolved on the basis of what assists the organization in achieving its goals.
- Setting goals gives you an opportunity to review and evaluate what has been done and discuss problems.
- Goals provide a benchmark against which progress can be assessed.
- Goals provide targets toward which efforts can be directed.
- Goals are the motivating force in the behavior of group members. Without motivation, the group takes no action to achieve its goals.

### "The good goal test"

- Are my goals consistent with the mission, vision, and purpose of the organization?
- Will the members of the organization agree with the goal?
- Are the goals **SMART**?
  - **S** specific, significant, stretching
  - **M** measurable, meaningful, motivational
  - **A** agreed upon, attainable, achievable, acceptable, action-oriented
  - **R** realistic, relevant, reasonable, rewarding, results-oriented
  - **T** time-based, timely, tangible, trackable

### Steps in goal setting

1. Brainstorm
  - a. Allow ideas to start flowing.
  - b. Build on others' ideas
  - c. Discuss with others what you would like your office to accomplish through your office.
2. Prioritize
  - a. Place goals in order of importance.
  - b. Remember to set a few goals to which you, the officer, will commit to.
  - c. Be realistic; do not over plan goals that can become unachievable.
3. Develop a quality action plan
  - a. Identify the steps needed to accomplish the goal.
  - b. Put the steps needed to accomplish the goal in order.
  - c. Be sure your goals are incremental and measurable.
  - d. Set a deadline for each step to be accomplished.

Adapted from:

Office of Student Activities and Leadership. (unknown). *Student organization officer transition guide*. Norfolk, VA: Old Dominion University. Retrieved December 7, 2009 from <http://studentaffairs.odu.edu/osal/form/studentorganizations/officerttransition.pdf>

Office of Student Engagement. (2009). *Goal setting worksheet*. Springfield, MO: Missouri State University. Retrieved December 7, 2009 from [http://studentorganizations.missouristate.edu/assets/activities/goal\\_setting\\_worksheet.doc](http://studentorganizations.missouristate.edu/assets/activities/goal_setting_worksheet.doc)

Student Involvement and Leadership Center. (2008). *Officer transition manual: For KU's registered student organizations*. Lawrence, KS: The University of Kansas. Retrieved December 7, 2009 from [http://www.silc.ku.edu/pdf\\_files/Officer\\_Transition\\_Manual.pdf](http://www.silc.ku.edu/pdf_files/Officer_Transition_Manual.pdf)



## Goal Setting Chart

Use the brainstorming chart below to write your position or organization goals for the next year. Be sure to develop action items to help you achieve the goals.

<b>GOALS</b>	<b>Why We Want This</b> How this goal falls in line with the mission, vision, and purpose of the group.	<b>Barriers/Limitations</b> to meeting this goals	<b>Resources</b> to help us achieve this goal	<b>Action Plan</b> to attain this goal	<b>Point person</b> charged with ensuring we meet this goal	<b>Target completion date</b>
				1.  2.  3.		
				1.  2.  3.		
				1.  2.  3.		

Adapted from:

Office of Student Activities and Leadership. (unknown). *Student organization officer transition guide*. Norfolk, VA: Old Dominion University. Retrieved December 7, 2009 from <http://studentaffairs.odu.edu/osal/form/studentorganizations/officerttransition.pdf>

Office of Student Engagement. (2009). *Goal setting worksheet*. Springfield, MO: Missouri State University. Retrieved December 7, 2009 from [http://studentorganizations.missouristate.edu/assets/activities/goal\\_setting\\_worksheet.doc](http://studentorganizations.missouristate.edu/assets/activities/goal_setting_worksheet.doc)

Student Involvement and Leadership Center. (2008). *Officer transition manual: For KU's registered student organizations*. Lawrence, KS: The University of Kansas. Retrieved December 7, 2009 from [http://www.silc.ku.edu/pdf\\_files/Officer\\_Transition\\_Manual.pdf](http://www.silc.ku.edu/pdf_files/Officer_Transition_Manual.pdf)

# Advisor Guide

Officer Training and Transition Guide  
Southeast Missouri State University

## Table of Contents

Advisor's Role in Officer Transitions	27
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## Advisor's Role in Officer Transitions

### With Outgoing Officers

- Ask outgoing officers to evaluate your advisor/officer relationship. What was most helpful to them? What else could be done to make the relationship more effective?
  - You may also want to complete an *Advisor Self-Evaluation* (see page 39) which can be found at the end in the *Tools* section.
- Get copies of all pertinent documents and financial records.
- Get keys, passwords, and login information.
- Request outgoing officers to provide you with samples of any paperwork they complete. That way, if a new officer has a question about how to fill it out, you will have an example.
- If the outgoing officers are leading transition training, determine together how you will be involved. Facilitate part of the training if possible.

### With Incoming Officers

- Think about which officers you have interacted with most over the past year. What have they needed help with? Meet with the new leaders in those positions; they will need your help too.
- Share your expectations of one another. New officers may want to work with you differently than the previous officers. That is ok! Work together to develop a plan for your partnership.
  - You may find creating an *Advisor Contract* with the organization helpful. A sample can be found in the *Tools* section of the Student Organization Handbook (see page 38)
- Be respectful of outgoing leaders, even if they made mistakes, the incoming officer needs to know that you will be supportive of them when they struggle, too.
- Allow the new officers to create their own vision/goals. They may have different ideas from the previous exec board; allow them to be creative when possible and to take ownership of their term.

### With Other Advisors

- Some organizations have several advisors. Determine who is responsible for advising each officer.
- Get other advisors involved in transition training. Even if most officers won't work with every advisor, it is still good for them to meet them all and know that they too can provide help.

### Checklist

- Contact information
  - Do you have the new officers' contact information?
  - Do they have yours?
- Bank account signatories
  - Take the outgoing and incoming Presidents and Treasurers to the bank and fill out new signatory cards.
- Next steps
  - Are your first one-on-one meetings scheduled?
  - Will you be attending the first group/exec meetings?

### For additional resources please visit:

- *ACPA Commission for Student Involvement Advisor Manual*  
<http://www.myacpa.org/comm/student/documents/acpaadvisormanual.pdf>
- *Student Organization Handbook, Advisor Resources*  
<http://www.semo.edu/leadership/studentorgs/resources.htm>

Adapted from:

Office of Student Engagement. (2009). Planning an office transition training. Springfield, MO: Missouri State University. Retrieved December 7, 2009 from [http://studentorganizations.missouristate.edu/assets/activities/Sample\\_Transition\\_Training\\_Agenda.doc](http://studentorganizations.missouristate.edu/assets/activities/Sample_Transition_Training_Agenda.doc) Misso

# Tools

**Officer Training and Transition Guide  
Southeast Missouri State University**

## **Table of Contents**

<b>Sample Event Report</b>	<b>29</b>
<b>Sample Letter to Bank</b>	<b>31</b>
<b>True Colors Leadership Styles Inventory</b>	<b>32</b>
<b>Advisor Contract</b>	<b>38</b>
<b>Advisor Self-Evaluation Checklist</b>	<b>39</b>
<b>Student Organization Officer Update Form</b>	<b>40</b>

## Sample Event Report

This document is available for your use to help you evaluate the success of an event and plan for future events.

Event \_\_\_\_\_ Date/Time \_\_\_\_\_

Location \_\_\_\_\_

Coordinator(s) \_\_\_\_\_

Co-sponsors \_\_\_\_\_ Student Government \_\_\_\_\_ D.I.C.E. \_\_\_\_\_ Other:

Attendance \_\_\_\_\_ Total \_\_\_\_\_ Students \_\_\_\_\_ Faculty/Staff \_\_\_\_\_ Community Members

Cost \_\_\_\_\_ (attach budget)

### Purpose of Program

### Description of Event

### SWOT Analysis

*What are the strengths and weaknesses of the event? What are the opportunities you had and what were the threats to your success?*

<b>Strengths</b>	<b>Weaknesses</b>
<b>Opportunities</b>	<b>Threats</b>

## Sample Event Report, cont.

How does the program enhance the academic environment of Southeast Missouri State University?

*Keep in mind: faculty involvement, intellectual peer dialogues, academic support services, and academic wellness*

How does this program enhance the general social environment of Southeast Missouri State University?

*Keep in mind: community expectations, community development, peer to peer connections, etc.*

How is this program inclusive of all members of Southeast Missouri State University?

*Keep in mind: issues related to gender, religion, race/ethnicity, ability, class, and sexuality*

How do you feel this event went? What would you do differently?

How did you utilize your co-sponsors in this event?

Would you recommend this event to next year's event coordinator? Why?

Additional comments

## Sample Letter to Bank

Date

Name of bank

Street address

City, State, ZIP Code

Re: Request to change name on account **number**

Dear Sir or Madam:

I am a customer with **bank name**. My account (**or accounts if you have several**) is under: **Full name**. However, our organization has recently changed officers and the new officer name is: **Full name**.

This letter is my formal request that you change your records of the account listed below to reflect the new officer information. Below, I have listed the pertinent information you can use to update the bank account records:

Old Officer information	New Officer information
<b>Full name</b> <b>Social Security number</b> <b>Account type</b> <b>Account number</b> <b>Old mailing address</b> <b>City, State and ZIP Code</b>	<b>New name</b> <b>Social Security number</b> <b>Account type</b> <b>Account number</b> <b>New mailing address</b> <b>City, State and ZIP Code</b>

In addition to changing the information on my accounts, please issue our organization with new checks with the new officer information **and a new ATM card (if applicable)**.

If you have any questions about these changes, you can contact me by using the information below.

Thank you for your prompt attention to my request.

Your Signature

Your Typed Name

Your Address

City, State and ZIP Code

Phone number

E-mail address

## True Colors Leadership Styles Inventory

True Colors can serve as a useful guide to help members of the executive board learn about one another's leadership style. With this information, the group can identify which officers have strengths in specific areas. It can also help to know this information to mediate conflict.

If your organization requires assistance using this inventory, please contact the Coordinator for Leadership Development (UC 202, 573.651.2280, leadership@semo.edu).

### True Colors Indicator

In this exercise, six words have been supplied in each box. Compare all four boxes in each row, ranking each set of words from 4 to 1. In the space provided, score from the following: 4 – most like you, 3 – a lot like you, 2 – somewhat like you, 1 – least like you.

Please select the word groupings based on your *natural tendency*, not what you are capable of doing if asked. This should reflect who you are naturally, not who you would like to be. DO NOT analyze each word; just get a sense of each box.

<b>1</b> Active Variety Sports Opportunities Spontaneous Flexible	<b>2</b> Organized Planned Neat Parental Traditional Responsible	<b>3</b> Warm Helpful Friends Authentic Harmonious Compassionate	<b>4</b> Learning Science Quiet Versatile Inventive Competent
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>5</b> Curious Ideas Questions Conceptual Knowledge Problem Solver	<b>6</b> Caring People Oriented Feelings Unique Empathetic Communicative	<b>7</b> Orderly On-Time Honest Stable Sensible Dependable	<b>8</b> Fun Action Challenges Competitive Impetuous Impactful
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>13</b> Sharing Getting Along Feelings Tender Inspirational Dramatic	<b>14</b> Active Free Winning Daring Impulsive Risk Taker	<b>15</b> Thinking Solving Problems Perfectionistic Determined Complex Composed	<b>16</b> Follow Rules Useful Save Money Concerned Procedural Cooperative
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>17</b> Puzzles Seeking Information Making Sense Philosophical Principled Rational	<b>18</b> Social Causes Easy Going Happy Endings Approachable Affectionate Sympathetic	<b>19</b> Exciting Lively Hands On Courageous Skillful On Stage	<b>20</b> Pride Tradition Do Things Right Orderly Conventional Careful
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



### True Color Score Sheet

Complete the True Color Score Sheet on the previous page. Write your scores in the corresponding spaces below. Add each row and put the total in the boxes at the right.

**Orange – Adventurer**

1

8

11

14

19

**Gold – Builder**

2

7

9

16

20

**Blue – Relater**

3

6

12

13

18

**Green – Planner**

4

5

10

15

17

# TRUE COLORS

Some general descriptions for each color based on aspects of life

AREA OF LIFE	BLUE	GREEN	GOLD	ORANGE
core need	self-actualization	competency	social belonging	freedom
overall mood	enthusiasm	cool, calm, collected	concerned	excitable
trusts	imagination	logic, consistency	authority	chance
takes pride in . . .	empathy	competence	dependability	impact
in management	the catalyst	the visionary	the traditionalist	the troubleshooter
Perception	significance	categorical	discrepancy	harmonics
supports, fosters	growth	invention	institutions	recreation
Virtue	loyalty	strength, determination	generosity	courage
stressed by	feeling artificial	inadequate	rejection	restrictions rigidity
strive for, seeks	love	insight	jurisdiction	freedom
at work	a catalyst	pragmatic	procedural	varied
esteemed by	helping people	finding insights	being of service	being resourceful
wants to be appreciated for	unique contributions	their ideas	accuracy, thoroughness	cleverness

## Orange Temperament Group

### Contributions

- Troubleshooter
- Quick response during crisis
- Negotiates compromises
- Initiates change
- Accomplishes mission in spite of the rules or culture

### Leadership Style

- Expects quick action and results
- Persuades others, often assertively
- Leads with energy and enthusiasm
- Uses humor to ease through situations
- Enjoys initial applications and start-up phases

### Preferred Work Environment

- Flexible, un-bureaucratic, does not always believe in following rules
- Rewards risk taking
- Relaxed, casual
- Lively, humorous
- Working with burst of energy after periods of little activity
- People intensive

### Blind Spots

- May not think before leaping
- May rely on improvising rather than thoughtful planning
- May overlook relevant details
- May procrastinate
- May appear blunt and insensitive

## Green Temperament Group

### Contributions

- Vision for the future mission of the organization
- Has the latest information
- Logical and analytical problem solving skills
- May have talent for technical applications
- May predict future organizational trends

### Leadership Style

- Prefers to lead autonomously and lead independent people
- Conceptually based
- Will re-organize when necessary
- Relates to others based on level of expertise, rather than level of position
- Respects information, data

### Preferred Work Environment

- Independent thinkers focused on complex problems
- Private, with time for much reflection
- Conceptual orientation
- Not restrained by rules or convention
- Flexible, unstructured, un-bureaucratic
- Focus on information relating to the future

### Blind Spots

- May be too abstract and theoretical
- May omit details when disinterested
- May appear indecisive and non-directed
- Critical analysis applied to coworkers may appear impersonal
- Teamwork and harmony may be deemed unnecessary

## Blue Temperament Group

### Contributions

- People-centered
- Accepts and deals with people as they are
- Connects people with others and resources
- Works for organizational value system
- Motivational
- Natural for customer service

### Leadership Style

- Participatory
- Responsive to others' needs
- People come first in the organization
- More likely to praise and reward, rather than criticize
- Natural facilitators
- Cooperates and collaborates, rather than competes

### Preferred Work Environment

- Friendly
- Conscientious, cooperative staff oriented toward helping
- Where individuals are actualized
- Harmonious
- Sensitive to needs of staff and clientele
- Appreciated of contributions

### Blind Spots

- May avoid conflicts
- May deny own priorities in deference to other's needs
- May be too trusting of other's motives
- May idealize the mission
- May withdraw when hurt

## Gold Temperament Group

### Contributions

- Works steadily to accomplishment by deadline
- Honors commitments
- Routine-oriented and details
- Works well within hierarchical, formalized structure
- Works well with factual information

### Leadership Style

- Traditional leaders who respect hierarchy
- Details are important
- "Practical results" are important to gold leaders
- Values those who follow the rules
- Expects others to comply with goals, structure, rules

### Preferred Work Environment

- Organized, planned, task-oriented
- Calm and quiet
- Sense of security is important
- Steady pace with no success
- Formal

### Blind Spots

- Flexibility not usually valued
- May be pessimistic about the future that is not mapped out
- Change
- Expect others to conform to the rules
- Day-to-day may take priority over long term plan
- May assume they know what is best for others or the organization

## GREEN

I seek knowledge and understanding. Analytical...Global...Conceptual...  
I live life by my own standards. Cool...Calm...Collected...  
I need explanations and answers. Inventive...Logical...Perfectionist...  
I value intelligence, insight, fairness, and justice. Abstract...Hypothetical...Investigative...  
I am a natural non-conformist, a visionary, a problem solver.

## ORANGE

I act on a moments notice. Witty...Charming... Spontaneous  
I consider life as a game, here and now. Impulsive...Generous... Impactful...  
I need fun, variety, stimulation, and excitement. Optimistic...Eager...Bold...  
I value integrity and unity in relationships. Physical...Immediate...Fraternal...  
I am a natural trouble-shooter, a performer, a competitor.

## BLUE

I need to feel unique and authentic. Enthusiastic...Sympathetic...Personal.  
I look for meaning and significance in life. Warm...Communicative...Compassionate...  
I need to contribute, to encourage, and to care. Idealistic...spiritual...sincere...  
I value integrity and unity in relationships. Peaceful...Flexible...Imaginative...  
I am a natural romantic, a poet, a nurturer.

## GOLD

I need to follow the rules and respect authority. Loyal...Dependable...Prepared...  
I have a strong sense of what is right and wrong in life. Thorough...Sensible...Punctual...  
I need to be useful and to belong. Faithful...Stable...Organized...  
I value home, family and tradition. Caring...Concerned...Concrete  
I am a natural preserver, a parent, a helper

## Advisor Contract

Once you have decided to make the commitment to be a student organization advisor, you may want to complete an advisor contract to clarify the expectations and responsibilities of the role for the student organization and yourself.

### Sample Advisor Contract

The members of \_\_\_\_\_ (student organization name) request \_\_\_\_\_ (advisor name) to serve as advisor of the organization for a period not to exceed \_\_\_\_\_ beginning \_\_\_\_\_ (start date).

Duties, responsibilities, and expectations of the position are as follows:

- A. List responsibilities and expectations of the advisor and organization
- B.
- C.

Duties and responsibilities may be reconsidered at the request of the advisor, executive board members, or a majority vote of the membership in a regular meeting.

This contract is in effect for \_\_\_\_\_ (period of time) and may be renewed each year thereafter upon the agreement of both parties.

President/Chairperson's Signature \_\_\_\_\_ Date \_\_\_\_\_

I have met with the President of the above-named organization and discussed the duties and responsibilities of advisor as listed above. I agree to serve as advisor and will fulfill these duties and responsibilities to the best of my abilities.

Advisor Signature \_\_\_\_\_ Date \_\_\_\_\_

Adapted from:  
ACPA Commission for Student Involvement. (2005). *Advisor manual*. Retrieved June 20, 2009, from <http://www.myacpa.org/comm/student/documents/acpaadvisormanual.pdf>  
Office of Leadership Development Programs at Eastern Washington University

## Advisor Self-Evaluation Checklist

This self-evaluation can help you to evaluate your success as a student organization advisor. It can be used to identify areas of strength and where improvement is possible.

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

- \_\_\_\_\_ I understand the goals of the organization.
- \_\_\_\_\_ I have read the groups constitution and by-laws.
- \_\_\_\_\_ I actively provide motivation and encouragement to members of the organization.
- \_\_\_\_\_ I am familiar with individual members of the organization.
- \_\_\_\_\_ I attend regularly scheduled executive board meetings.
- \_\_\_\_\_ I regularly schedule organizational meetings.
- \_\_\_\_\_ I attend the organization's special events.
- \_\_\_\_\_ I attend conferences with the organization's members.
- \_\_\_\_\_ I assist with the orientation and training of new officers.
- \_\_\_\_\_ I help to provide continuity for the organization.
- \_\_\_\_\_ I understand the principles of group development.
- \_\_\_\_\_ I understand how students grow and learn.
- \_\_\_\_\_ I can identify what members have learned by participating in the organization.
- \_\_\_\_\_ I understand the principles that lead to orderly meetings.
- \_\_\_\_\_ I address the negative behavior of members.
- \_\_\_\_\_ I recommend and encourage without imposing my ideas and preferences.
- \_\_\_\_\_ I monitor the organization's financial records.
- \_\_\_\_\_ I understand the principles of good fundraising.
- \_\_\_\_\_ I understand how the issues of diversity affect the organization.
- \_\_\_\_\_ I know the steps to follow in developing a program.
- \_\_\_\_\_ I know where to find assistance when I encounter problems I cannot solve.
- \_\_\_\_\_ I utilize the services provided by Campus Life & Event Services.

Adapted from:

ACPA Commission for Student Involvement. (2005). *Advisor manual*. Retrieved June 20, 2009, from <http://www.myacpa.org/comm/student/documents/acpaadvisormanual.pdf>

# Student Organization Officer Update Form

Campus Life & Event Services  
Southeast Missouri State University

For office use only:

Date Received: \_\_\_/\_\_\_/\_\_\_ Verified by: \_\_\_\_\_  
\_\_\_ Good standing judicial \_\_\_ Academic good standing  
\_\_\_ SO database updated \_\_\_ SO website updated

**Organization Name:** \_\_\_\_\_

Student Government requires five active student representatives in good academic (2.0 GPA or better) and disciplinary standing.

Below, please list the five primary officers for your student organization prior to listing general members. List the name and position of the outgoing officer followed by the person who replaced him or her along with the new officer's contact information and signature. Your advisor must also sign this form. We cannot accept this form without the signatures of all incoming officers and your advisor.

By completing and signing this form, you agree that you have read, understand, and shall abide by the policies set forth in the Student Organization Handbook and **authorize Student Government, Campus Life & Event Service staff and/or designee to verify academic and disciplinary standing with Southeast Missouri State University.**

## OUTGOING CHIEF EXECUTIVE OFFICER

Name: \_\_\_\_\_

Position: \_\_\_\_\_

## INCOMING CHIEF EXECUTIVE OFFICER

Official title of this officer \_\_\_\_\_

Name: \_\_\_\_\_

SO #: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Signature: \_\_\_\_\_

## OUTGOING EXECUTIVE OFFICER #2

Name: \_\_\_\_\_

Position: \_\_\_\_\_

## INCOMING EXECUTIVE OFFICER #2

Official title of this officer \_\_\_\_\_

Name: \_\_\_\_\_

SO #: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Signature: \_\_\_\_\_

## OUTGOING EXECUTIVE OFFICER #3 or GENERAL MEMBER

Name: \_\_\_\_\_

Position: \_\_\_\_\_

## INCOMING EXECUTIVE OFFICER #3 or GENERAL MEMBER

Official title of this officer \_\_\_\_\_

Name: \_\_\_\_\_

SO #: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Signature: \_\_\_\_\_

## OUTGOING EXECUTIVE OFFICER #4 or GENERAL MEMBER

Name: \_\_\_\_\_

Position: \_\_\_\_\_

## INCOMING EXECUTIVE OFFICER #4 or GENERAL MEMBER

Official title of this officer \_\_\_\_\_

Name: \_\_\_\_\_

SO #: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Signature: \_\_\_\_\_

## OUTGOING EXECUTIVE OFFICER #5 or GENERAL MEMBER

Name: \_\_\_\_\_

Position: \_\_\_\_\_

## INCOMING EXECUTIVE OFFICER #5 or GENERAL MEMBER

Official title of this officer \_\_\_\_\_

Name: \_\_\_\_\_

SO #: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Signature: \_\_\_\_\_

**ADVISOR NAME:** \_\_\_\_\_

**ADVISOR SIGNATURE:** \_\_\_\_\_