

***OFFICER
TRANSITION
&
TRAINING***

Texas A&M University-Corpus Christi

OUTGOING EXECUTIVE OFFICERS EVALUATION HANDOUT

**THIS WORKSHEET SHOULD BE
DISCUSSED AND COMPLETED AS AN OUTGOING TEAM.**

1. Have we developed members who will prove to be exceptional and involved?
2. Will the membership be innovative and creative after we have left?
3. What programs/ideas proved to be successful for us?
4. What was our greatest achievement as an executive board?
5. List three things that we would like to have accomplished:
6. List three things that we would like our successors to achieve:

OFFICER NOTEBOOKS HANDOUT

This may be the most difficult work in your transition process. If your notebook is cleaned out and organized, it will make everything else run smoother! This sheet is due _____, so please get this information in order now.

- _____ Philosophy, mission or purpose statement of the organization
- _____ Organization Constitution & Bylaws
- _____ National Organization Officer Handbook
- _____ TAMUCC Student Handbook, Greek Handbook
- _____ Officer responsibilities. Explanation of every aspect of your responsibilities.
- _____ Officer, Committee Reporting Structure. Include a Description of Committees.
- _____ Organization Membership List
- _____ Historical records of organization
- _____ Meeting minutes and agendas
- _____ Listing of basic annual procedures (**Student Organization Registration, room reservations, etc.**)
- _____ Accurate records of activities over the past year (i.e., contracts, meetings, dates of events, successes/failures, etc.)
- _____ Program evaluations
- _____ Financial Records (**Treasurer's Reports, Budget**)
- _____ Calendar for past year
- _____ Resource of contact list of important people (**Student Activities, Dean of Students, National Headquarters Contacts**)
- _____ Contact list of Chapter Presidents & Council Officers
- _____ End of Semester Report (see pg. 4)
- _____ Recommendations for coming year
- _____ Other: (please list)

Date Completed

Outgoing Officer's Signature

Incoming Officer's Signature

END OF SEMESTER REPORT HANDOUT

PURPOSE

To assist in officer transition by focusing upon the accomplishments and to provide a critique of your year in office. This Report should serve your successor as a supplementary resource in planning for his/her term.

OFFICE: _____

NAME: _____

DATE: _____

1. List other officers/chair people with whom you worked with and the projects involved.
2. List specific successes realized during your term in office and the reasons for their success.
3. List any problems or disappointments you encountered as part of your office and suggest ways of avoiding or correcting them.
4. List supplemental materials and sources of information you found most helpful. Include faculty contacts, staff contacts, community resources, etc.
5. Comment on the timetable applicable to your office. Give suggestions for increasing efficiency and effectiveness.
6. List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

FIRST ONE-ON-ONE MEETING HANDOUT

Make this as comfortable and relaxing as possible. Do not breeze through this information. ***TAKE YOUR TIME***. Remember that you are very comfortable with this information and the responsibilities of this office after serving for a full year. Remember that all of this is new to the incoming officer. Take time to explain this information and go over everything on the checklist. Remember this is due by _____.

- _____ Give your cleaned out, organized notebook to the new officer and explain the contents.
- _____ Explain the duties and responsibilities of the office.
- _____ Explain the duties that go along with the office that are not in the officer's descriptions.
- _____ Review the past year's calendar and explain programs and events.
- _____ Read through the constitution & bylaws.
- _____ Explain forms and files that have been started over the past year.
- _____ Review historical files.
- _____ Provide a copy of the Student Handbook
- _____ Review the officer's budget (if you don't know what it is, get with the treasurer before you have your first one-on-one).
- _____ Check supplies and materials that this officer requires. Explain to the officer how to get the supplies and where to get them.
- _____ Together, brainstorm some goals for this office.
- _____ Discuss time line and deadlines for this office. Discuss the importance of meeting deadlines for events/forms.
- _____ Set date and time for second one-on-one meeting.

Date Completed

Outgoing Officer's Signature

Incoming Officer's Signature

SECOND ONE-ON-ONE MEETING HANDOUT

After the new officer has had a week to soak in the information and to write down some pertinent questions, set up your **SECOND ONE-ON-ONE MEETING**. Remember, this is due by _____.

_____ Review goals from previous year.

- What is the status of these goals?
- Which goals are completed?
- Which goals need to be followed up on?

_____ Set objectives for the new goals.

_____ Set a time line for objective completion.

_____ Discuss the role of the Greek Advisor for this officer.

_____ Set a time to meet and check with each other during the first month in office.

_____ Set a time for the outgoing officer to introduce the new officer to key resource people on campus.

- Greek Advisor
- Graduate Assistant for Student Organizations
- Student Body President
- Student Activities Staff
- Director of the Student Center
- Administrative Staff
- Answer all questions of the new officer! (**Please list questions & responses**)

Date Completed

Outgoing Officer's Signature

Incoming Officer's Signature

Advisor's Signature

OFFICER-ELECT WORKSHEET HANDOUT

1. What is the purpose of my office?
2. What are my responsibilities?
3. What ideas and goals do I have for improving this office?
4. What new/old programs do I plan to utilize during my term in office?
5. What short-term goals do I want to accomplish (**5**) goals? How am I going to accomplish those goals?
6. What long-term goals do I want to accomplish (**5 goals**)? How am I going to accomplish those goals?

OFFICER GOAL SHEET

Name: _____
Office: _____

Date: _____
Term of Office: _____

LONG RANGE:

1. _____

2. _____

3. _____

SHORT RANGE:

1. _____

2. _____

3. _____

Your goals must be **SMART**: Specific, Measurable, Achievable, Realistic and Timely

Use the following resources when setting your goals:

- Chapter Goals
- Outgoing officer's suggestions and previous goals
- Your Committee
- Chapter Constitution & Bylaws
- Chapter Advisor
- Any materials in your files as appropriate

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|---|
| When you have completed the Action Plan for each goal place a check mark by the number. Long Range Goals: 1. ___ 2. ___ 3. ___ Short Range Goals: 1. ___ 2. ___ 3. ___ |
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GROUP BALANCE SHEET HANDOUT

Often we need to ask ourselves a few questions before we know how we stand as a group. A few good questions to ask ourselves are:

1. Is there a group consensus as to where we are headed?
2. Does every member participate in the decision-making process?
3. Does every member do his/her share of organizational operations?
4. Do the officers know what the members really want?
5. Does everyone have a strong, positive feeling about the organization?
6. Do we know what is contained in our mission statement (Preamble)?
7. What is our self-image?
8. What things do we, as a group, do well?
9. What do we have trouble doing?
10. How do we work together?
11. Do we have definite goals?
12. How can we have a higher profile on campus?
13. What weaknesses do we need to correct next year?
14. Do the general members support the officers?
15. How much do we want to be successful?
16. What do we want out of this experience?
17. What can each of us contribute to make our experience more meaningful?

OFFICER EXCHANGE CHECKLIST

Name _____ Office _____

MATERIALS

Address & Phone List

- Chapter members' school & home addresses, phone number & e-mail
- New members' school & home addresses, phone number & e-mail
- Advisors' home & work phone number, e-mail & fax
- Corporation Board home & work phone number, e-mail & fax (if applicable)
- Regional Officer's home & work phone number, e-mail & fax

Agenda & Notes

- Chapter Meetings
- Executive Board Meetings

Budgets

- Officer
- Chapter

Calendars

- Chapter Calendar
- Reports Due Calendar with dates highlighted

National & Chapter Guidelines

- National Constitution & Bylaws
- Chapter Constitution & Bylaws
- Code of Conduct
- Crisis Management Procedures

Goals

- Chapter
- Personal
- Action Plan to achieve goals

Forms

- Blank copies of report forms
- Copies of past reports
- Officer Mid-Term Evaluation Sheet

Officer Description

- Evaluation of activities
- Resource List (Programs, Speakers, Retreat Locations, etc.)
- Suggestions, helpful hints, ideas
- "What to do when" list (if applicable)