

# BETA GAMMA SIGMA STUDENT OFFICER TRANSITIONING GUIDE



**We are BGS! We are the “Best in Business”**

Between increasing student awareness and engagement, improving alumni and collegiate interactions, encouraging earlier inductions and much more, the Society is looking toward the future and making real steps to make Beta Gamma Sigma a more proactive and engaging organization. These may be lofty goals, but with the continued support of lifetime members like you, there is little doubt that Beta Gamma Sigma can make its second century even better than the first.

## THE TRANSITION

Too often, Student Officers dedicate themselves to successfully leading their chapters for an academic year and at the end of their terms, leave the positions without spending time to make sure the incoming Student Officers have the opportunity to be trained. When this happens, all the information regarding the previous year and the lessons learned are not passed on to the incoming Student Officers, thus slowing down their progress. Without taking the time to effectively transition incoming Student Officers, chapters lose the opportunity to continue the momentum gained in the previous year. Time that could be used moving the Society forward and accomplishing new goals is spent trying to catch up.

## EFFECTIVE TRANSITIONING

This guide is designed to provide chapters with the tools to successfully transition outgoing and incoming Student Officers. The forms in this packet are meant to empower students to have intentional conversations with one another to minimize the effects of turnover within chapters, increase the Society's success and continue the momentum accomplished by chapters during the previous year.

The Student Officer Transitioning Guide is designed to be used in sections:

1. **Outgoing Student Officer**: Outgoing Student Officer Transition Worksheet, Outgoing Student Officer Evaluation
2. **Incoming Student Officer**: Incoming Student Officer Transition Worksheet, Personal Goal Setting for Your Position, Goal Setting – Further Considerations

## MAINTAINING YOUR RECORDS

The most effective way to use this guide is in conjunction with a three ring binder. The binder will hold this guide, including the forms and worksheets found inside, along with any additional documents that you deem relevant such as the Student Chapter Officer Handbook, past flyers and contact information.

## BINDERS/FILES/NOTEBOOKS

To properly assist with the transition, outgoing Student Officers should keep the following documents throughout the year and organize them in a binder to hand off to the new Student Officer.

### **Suggestions for What to Include:**

#### **Items Related to the Society:**

1. Student Officer Group Documents
  - A. Beta Gamma Sigma Mission Statement
  - B. Beta Gamma Sigma Constitution and By-Laws
  - C. Chapter Calendar
  - D. Student Chapter Officer Handbook
  - E. Student Officer Guidelines
  - F. Student Officer Position Descriptions
  - G. Year-end Reports and Evaluations
  - H. Student Officer Transitioning Guide (including the completed worksheets, evaluations and specific Student Officer position goals sheets)
2. Budget information
3. Chapter Goals
4. Agendas
5. Student Officer Program and Events Details and Reports

**Items Related to the University:**

1. University Mission Statement
2. University Policies
3. Campus Student Organization Policies

**Additional Helpful Resources:**

1. Important names, numbers and email addresses (contact list)
2. Resource list
3. Important forms
4. Previous and current chapter goals - both met and unmet
5. Unfinished project information
6. Do's and Don'ts, helpful hints and lessons learned

**TRANSITION MEETINGS: SETTING THE TONE FOR THE FUTURE**

Student Officers should be elected/selected during the spring semester prior to the start of their term in the fall. It is highly recommended that transition meetings occur with the incoming and outgoing Student Officers soon after the elections/selection process is completed in the spring. In this guide you will find the following:

1. Transition Meeting Outline
2. Outgoing Student Officer Forms and Evaluations
3. Incoming Student Officer Worksheets and Planning Guides

## Student Officer Transition Meeting Outline

Before the newly elected/selected Student Officers of your chapter officially assume their responsibilities, it is best for the old and new Student Officers to get together for a transition meeting. Such a transition meeting provides continuity and continued growth for the Society while allowing the new Student Officers to learn from the experiences of the outgoing Student Officers. A casual, open atmosphere should be encouraged so the chapter can benefit from an honest evaluation of the accomplishments and issues of the previous year. We recommend that the outgoing Student President leads the discussion during this meeting, with the Chapter Advisor being present to offer additional input. Please be sure to include all incoming and outgoing Student Officers in this discussion. The following outline can help make the transition meeting flow as smoothly as possible:

### **I. Welcome and Introductions**

- A. Help participants get acquainted
- B. Explain the purpose of the meeting

### **II. The Year in Review**

- A. **Goals:** Review the group's goals for the previous year.
  - i. What did we hope to accomplish?
  - ii. How well did we do on each goal?
  - iii. What goals should be continued this year?
  - iv. What goals need to be changed?
  - v. What goals are no longer feasible?
- B. **Programs and Activities:** Evaluate what your group did last year.
  - i. How effective were the programs/activities we sponsored? How did we measure their effectiveness?
  - ii. Did we have a good balance in our schedule of programs and activities?
  - iii. Were our programs and activities consistent with our goals?
  - iv. What activities and programs do we want to repeat?
  - v. What activities and programs do we need to rethink or discontinue?
- C. **Membership:** Evaluate number of members and their commitment.
  - i. What actions did we take to recruit members?
  - ii. Were our recruitment efforts successful?
  - iii. Are our members as actively involved as we want them to be?
  - iv. What were the opportunities for members to get involved in a meaningful way?
  - v. How can we increase engagement opportunities for members?
- D. **Student Officers and Organizational Structure:** Evaluate Student Officers and structure.
  - i. Did Student Officers work as a team, or is there more teamwork needed? If so,
    - 1. What contributed to that dynamic?

2. Is the time and effort required in each position comparable?
  3. Is there two-way communication between Student Officers and members?
- E. **Organizational Operations:** Evaluate finances, communication, etc.
- i. Were the finances adequate for our group and managed properly?
  - ii. Were meetings run effectively? Was their frequency adequate?
  - iii. Did we have scheduling conflicts with other groups or activities?
- F. **Evaluating the Working Relationship between the Chapter Advisor/Admins and the Student Officers:** Evaluate both quality and quantity.
- i. In what ways did the Student Officers assist the Chapter Advisors/Admins this year?
  - ii. Did our Advisor provide the support we needed?
  - iii. How could we improve Chapter Advisor involvement?
  - iv. How can the Student Officers provide additional assistance to the Chapter Advisor/Admins next year?
- G. **Chapter/Society Visibility and Recognition:** Evaluate how other groups perceive you.
- i. How do we see ourselves? Is this how non-BGS members view us?
  - ii. How can we enhance our image?

### **III. Your Legacy to the New Student Officer Team**

- A. What are the current strengths and weaknesses of the group?
- B. What is the best advice you can give the incoming Student Officer?
- C. What were the major challenges and accomplishments during your term?

### **IV. Student Officer Transition**

- A. Have the incoming and outgoing Student Officers meet individually with their position counterpart to discuss and complete the worksheets. During the meetings, the following should be discussed:
- i. Responsibilities of the position, with a job description
  - ii. A timetable for completion of annual duties
  - iii. Unfinished projects
  - iv. Important contacts and resource persons
  - v. Mistakes that could have been avoided
  - vi. Advice for the incoming Student Officer
  - vii. Any questions the new Student Officer may have
  - viii. Where the outgoing Student Officer can be reached with future questions

### **V. Wrap-Up**

- A. Wish outgoing Student Officers the best in their future endeavors and congratulate incoming Student Officers on their new positions.
- B. Provide an opportunity for informal socializing.

## Student Officer Resources

The Global Headquarters of Beta Gamma Sigma provides numerous resources for Student Officers to assist you in your roles. The following are a list of resources available:

- Student Officer Handbook
- Student Officer Transitioning Guide
- Student Officer Chapter Notes
- Student Officer Page on the Beta Gamma Sigma Website
- Student Officer Training Webinars
- Sample Chapter Event Ideas
- Sample Chapter Publicity Ideas
- Chapter Best Practices

For additional details on these resources, please refer to your Student Officer Handbook.

In addition to the above resources, the Global Headquarters Staff is here to assist you in maximizing your role as a Student Officer. We can be reached via email at [bqshonors@betagamma.org](mailto:bqshonors@betagamma.org) or you can call us at 314-432-5650.

Chapter Operations Staff primarily works with the Student Officers, with Cherie Campbell, ([ccampbell@betagamma.org](mailto:ccampbell@betagamma.org)) being the primary contact for you. The following is a list of Chapter Operations Staff Members:

- **Christina Allrich:** Director, Chapter Operations
- **Katie Avendano:** Senior Manager, Collegiate Chapter Operations
- **Cherie Campbell:** Manager, Collegiate Chapter Operations
- **Alyssa Shyken:** Manager, Collegiate Chapter Operations

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## Outgoing Student Officer Transition Worksheet

*[To be completed by the outgoing Student Officer before transition meetings and training sessions]*

**Position Title:** \_\_\_\_\_

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

**Phone Number:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Directions:** Please think through and respond to the following questions regarding your responsibilities.

List other Student Officers (names and position titles) with whom you worked and the projects involved:

List what you enjoyed most and least regarding your position:

Who was the most helpful in getting things done? Who were good resources? List other aids that helped complete your job:

Things you wish you had known before you took the job include:

List specific accomplishments realized during your term in office and the reasons for their success. What did you try that worked well and would suggest doing again? Why?

List any problems or disappointments you encountered as a part of your position and suggest ways of avoiding or correcting them. What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?

What could you have done to make this a better experience?

List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, University/College Chapter Officers, community resources, etc.

What should be done immediately during the summer? In the fall?

List any other suggestions you feel would be helpful to the incoming Student Officer in carrying out the responsibilities of this office.

## Outgoing Student Officers Evaluation

This document is to be used by the outgoing Student Officers at a final chapter meeting to assess the entire group's process throughout the year. This document should first be completed by all the outgoing Student Officers. The Student President should then compile the responses, review them with the Chapter Advisor (including any additional input), and then provide the responses to the incoming Student President.

What have we done to develop younger members who will prove to be exceptional and involved?

What programs, events, or practices proved successful for us?

What was our greatest achievement as a chapter?

What was our greatest challenge as a chapter?

Three goals we would have liked to accomplish:

- 1.
- 2.
- 3.

Three goals we would like the incoming Student Officers to achieve/build on:

- 1.
- 2.
- 3.

## Incoming Student Officer Transition Worksheet

Below are examples of suggested questions incoming Student Officers can ask the outgoing Student Officers to gain a solid understanding of the position:

Things specific to the position I should know about include the following (forms, duties, etc...):

What can I do over the summer to prepare for the upcoming academic year?

What people should I get to know (include names, positions and contact information if available)?

What things do I need to know about working with our Advisor?

What expectations do you believe student members have of you?

What problems or areas will require attention within the next year?

What should be done immediately in the fall?

## Personal Goal Setting for Your Position

Before you begin goal setting with the other Student Officers, you may benefit personally by developing your own goals. The goals may vary in terms of being long or short in range. Some things you may want to think about for yourself might be: the tone you would like to create in your chapter, programming ideas, personal growth, the people you will be working with, budgeting, leadership training, etc.

Begin your personal goal setting now by brainstorming what you would like to accomplish during the upcoming year.

- 1.
- 2.
- 3.
- 4.
- 5.

Now, list things you can do right away:

Things I want to do starting right now!!! (Be specific - how, when, where...)

- 1.
- 2.
- 3.
- 4.
- 5.

Things I want to get started on soon: (When?)

- 1.
- 2.
- 3.
- 4.
- 5.

Things the outgoing Student Officer indicated I should do right away:

- 1.
- 2.
- 3.
- 4.
- 5.

How do I get started? Is there anything I can do before tomorrow? What specifically?

What can I realistically have accomplished one-week from today? One-month? This entire academic year?

## Goal Setting – Further Considerations

### Considerations:

Are my goals consistent with my understanding of the purpose of the chapter?

Will the members of my chapter agree with my goals? (Check with them)

Am I being realistic? Can I accomplish my goals during my term as a Student Officer?

### Goals I Want to Accomplish During my Term:

#### 1. Projects

A.

B.

C.

2. Process or manner in which we go about projects (i.e., involving people in decisions, having more members participate in meetings, having more interesting meetings, etc.)

A.

B.

C.

Where Can I Begin?

Do I have the skills necessary to accomplish my goal?

Who else in my chapter can help me? Are there outside resources and people who might help?