UWRF Student Organization Officer Transition Checklist

Most successful student organizations implement some form of officer transition program. In order to be most effective, officer terms should provide at least one month of overlap so new officers have the opportunity to work closely with outgoing officers in order to understand the roles and responsibilities of their respective leadership positions.

A smooth transition is the responsibility of both the outgoing and incoming officers of an organization. This checklist serves as a guide for training new officers, closure for the outgoing leaders, and helps the organization maintain consistency from year to year.

As an Advisor encourage the officers of your student organization to thoroughly review this document to ensure the new officers are set up for success!

Share Files Related to Officer Positions and the Organization:
Make sure the incoming officer has a copy of the following items:

- Mission, philosophy, goals and/or purpose statement of the organization
- Copy of Constitution and bylaws *(a copy should be on your FalconSync profile)*
- Financial records
- Member and officer contact list
- Log-in information for online resources/e-mail accounts
- Contact information of important people and relevant offices on campus
- Web page and webmaster information (if you have one)
- List of basic annual procedures and/or calendar of annual events
- Evaluations of previous and current projects
- Meeting minutes and agendas
- Any historical records of the organization

Introduce New Officer to FalconSync:
- Ensure the new officer is a member of the student organization’s FalconSync portal and make them an administrator in the “People” function.
- Renew you FalconSync “Profile” with correct contact information

Discuss Relevant Student Involvement and University Policies

Introduce New Officers to the Student Organization Advisor
- Schedule a new officer/Advisor meeting to discuss how the Advisor will work with the organization under the new leadership
- Use the Student Leader/Advisor worksheet provided earlier in this handbook as a guide

Review Budget and Funding
- Discuss the financial status of the organization
- Share where the organization has received money from over the past year
• Does your organization have a bank account? If so, ensure the correct name is on the account
• Share the Annual Funding Request that was submitted to AFAB and explain the status of the request
• Discuss which fundraisers have worked and which have not
• Show the treasury and budget tools on your FalconSync portal

**Introduce and Explain the Office of Student Involvement**

Explain that the Office of Student Involvement provides support and resources to all student organizations. Some ideas to discuss include:

• Organization renewal
• Mandatory Student Organization Officer Training
• Mandatory Budget Training
• Fall and Spring Involvement Fairs
• Helpful staff in the Office of Student Involvement

**Give a Tour of the Involvement Center Resources**

• Paper and Printing Supplies
• Poster Making Supplies
• Student Involvement Resource Library
• Organization Storage Cabinets
• Marketing and Graphic Design Workshops
• Campus Reservations Desk