



UWEC Student Organization Officer Transition Checklist Spring, 2022

Most successful student organizations implement some form of officer transition program. To be most effective, officer terms should provide at least one month of overlap so that new officers have an 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 members of an organization. This document serves as a guide for training for new officers, closure for the outgoing leaders, and helps the organization maintain consistency from year to year. Please thoroughly review this document to ensure the new officers are set up for success!

✓ **Share Files Related to your Position and Organization**

Make sure the incoming officer has a copy of the following items:

- Mission, philosophy, goals and/or purpose statement of organization
- Copy of current Constitution and/or By-laws (an updated copy should have been saved from your organizations' previous Blugold Connect portal or by reaching out to the Activities, Involvement, and Leadership office)
- All financial records
- An updated Student Organization Officer Roster Update form (available online at <https://www.uwec.edu/kb/article/student-org-officer-roster-update-form/>) - this is a temporary form while the Blugold Connect system transitions to the new and improved Blugold Connect+ system over the summer months.
- Log-In information for online resources/email accounts/social media accounts
- Contact information of important people/offices on campus
- Web page and webmaster information. Social media oversight? Who and how will the sites be maintained?
- List of basic annual procedures and/or calendar of annual events
- Evaluations of previous and current projects/events
- Meeting minutes and agendas
- Any historical records of the organization

✓ **Share with new Officers that a new and improved online student organization management, event, engagement tracking, and all-in-one campus-wide app system - "BLUGOLD CONNECT+" will be ready for them this upcoming fall, 2022 semester.**

In the mean-time please visit the [Student Organization Resources website](#) and submit the following items prior to the end of the spring semester:

- Ensure you've submitted an updated [Student Organization Officer Roster update form](#)
- Submit any student organization upcoming events via the [UWEC Calendar of Events Request Form](#)

✓ **Locate and Review Student Organization & Advisor Handbook (Discuss University Policies & Procedures review)**

[Student Organization & Advisor Handbook](#) (2021-2022 – revisions take place every summer)
[Student Organizations Resources Webpage](#)

✓ **Introduce New Officer(s) to the Student Organization Advisor**

- Schedule a new officer and Advisor meeting to discuss how the Advisor will work with the organization in the future.

✓ Review Budgets, Funding Sources, and Bank Accounts

- Discuss the financial status of the organization
- Share where the organization received money from this year
- Does your organization have an on or off-campus bank account? If so, ensure the correct name is on the account.

Submit a [US Bank meeting template form](#) to US Bank to update account signatories.

- Ensure your organization has updated their bank account and has opted for electronic bank statements (the Student Organizations & Leadership Center no longer stores student org bank statements)
- Share Annual Funding Request/Allocation (if any) that was submitted to the Student Organizations Commission of the Student Senate and explain the status of the request (if you are not sure, contact the Student Senate office)
- Discuss which fundraisers worked and which ones did not

✓ Introduce and Explain the Activities, Involvement, and Leadership Office

Explain that the Activities, Involvement, and Leadership Office provides support and resources to all UWEC Recognized Student Organizations.

Some important ideas to discuss:

- Organization Renewal - All student organizations must renew each year by OCTOBER 15TH.** This is done by updating your organization profile within the new Blugold Connect+ system AND ensuring you have reviewed and updated your organizations' Constitution Form (this form will be available on Blugold Connect+ this upcoming fall.) ("Approved" Constitution Forms must be submitted within your annual renewal registration submission.)
- Completing Mandatory Fall Student Organization Leaders Training (Kaleidoscope) - This online module must be completed each year by all recognized student organization presidents by OCTOBER 15th.**
- Pre-Register for Fall Blu's Organizations Bash** – the Fall, 2022 event is scheduled for September 7th on the Campus Mall (rain-site = Ojibwe & Dakota Ballrooms, 3rd Floor Davies Center.) The [Fall, 2022 BOB Registration Form](#) can be found on the [Student Organizations Resources website](#).
- [Activities, Involvement, and Leadership Office Staff](#)

Contact information can also be found on page 3 of the Student Organization & Advisor Handbook:

Senior Coordinator of Engagement – Sara Thommesen

Senior Coordinator of Student Leadership & Greek Life – Katy Rand

Events Coordinator – Joann Martin

AIL & Student Senate Office Manager – Stephanie Pyykola

Student Organizations Commission Director of Student Senate – stusen52@uwec.edu

✓ Give a Tour of the Student Organizations & Leadership Center Resources (Davies 220)

Student Organization Resources include:

- Printer & Copier/Scanner
- Computer Station
- Student Organization dedicated meeting rooms (Pine and Cedar – accommodates up to 10 people)
- Poster/banner making and art supplies (Student Organizations Workshop)
- Student Life Resource Library
- Organization Storage Lockers
- Student Organization Reservations – contact [Michael St.Ores](#) (Event Coordinator) in Event Services-Davies 240Q)

If you have any questions or concerns throughout the transition process, please contact the Senior Coordinator of Engagement via e-mail at: thommese@uwec.edu.