



UWEC Student Organization Officer Transition Checklist

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' Blugold Connect+ portal or by reaching out to the Activities, Involvement, and Leadership office)
- ☐ All financial records (including W-9 form)
- ☐ Updated Student Organization Officer Roster information (officers must be included within your organizations' Blugold Connect+ portal information.)
- ☐ 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 (ie: Annual Student Organization Re-registration)
- ☐ Evaluations of previous and current projects/events
- ☐ Meeting minutes and agendas (it is recommendation to upload all meeting minutes/agendas into your organization's Blugold Connect+ portal under "Files")
- ☐ Any historical records of the organization (it recommended to upload historical documents into your organizations' Blugold Connect+ portal under "Files")

✓ **Share with new Officers that they should utilize the online student organization management, event, engagement tracking, and all-in-one campus-wide app system - "BLUGOLD CONNECT+" to assist them in managing the student organization.**

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

[Student Organization & Advisor Handbook](#) (2023-2024 – 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

Coming spring/fall 2024

All student organizations will have the opportunity to have an on-campus account that is overseen by UW-Eau Claire. These accounts are highly encouraged to maintain consistency, security, and accountability for your student organization on a long-term basis. More information will be forthcoming.

✓ **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 Annual Re-Registration - All UWEC student organizations must re-register each year by OCTOBER 15TH.** *This is done by updating your organizations' portal information within the new Blugold Connect+ system AND ensuring you have reviewed and updated your organizations' Constitution information (all student organizations will be prompted to complete the required online UWEC Constitution requirements via their Blugold Connect re-registration submission.)*
- ☐ **Attending the Mandatory Fall Student Organization Leader Training** (all Presidents) - *This workshop is required of all student organization Presidents as part of the Annual Student Organization Re-registration requirements.*
- ☐ **Pre-Register for Blu's Organizations Bash events** – please watch your “**Student Org News & Updates**” emails for important event registration information (these are typically sent via Blugold Connect+ on a bi-weekly basis during the fall and spring semester.)
- ☐ **[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 – Katy Rand

AIL & Student Senate Office Manager – Stephanie Pyykola

Graduate Assistant – Tess Schoenborn

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 Makerspace)
- ☐ 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 Student Organization Engagement via e-mail at: thommese@uwec.edu.