



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 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 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 (for easy access it is highly recommended that all meeting minutes/agendas be uploaded into your organization's Blugold Connect+ portal under "Files")
- Any historical records of the organization (it is recommended to upload historical documents within your organizations' Blugold Connect+ portal under "Files.")

✓ **Let the new officers know that [Blugold Connect+](#) is where they can manage the student organizations' business** (officer/member rosters, event creation & promotion, attendance tracking, file storage, photo & video storage, budget tracking, communications with members, website creation, task assigning, and more!)

- Review [Student Organization & Advisor Handbook](#)
- Review [Student Organization Resources webpage \(click on "Student Org Resources" tab\)](#)

✓ **Introduce new officer(s) to the Student Organization Advisor(s)**

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

✓ **Review Budgets, Funding Sources, "New" On-Campus Accounts, & Bank Accounts**

- Discuss the financial status of the organization
- Share where the organization received money from this year
- 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

NEW ON-CAMPUS STUDENT ORG ACCOUNTS NOW AVAILABLE

All student organizations are highly encouraged to open a **new On-Campus Account** that is overseen by UW-Eau Claire. These new accounts provide improved consistency, security, and accountability for your student organization on a long-term basis. Bank accounts pose a much higher risk to your organization and have no oversight by the university.

Important Note: All student organizations who apply and are awarded funding from the Student Organization Segregated Fee funding process or the Special Allocation (one-time) funding process are required to have an on-campus account (plan accordingly.)

Click [HERE](#) to apply for an On-Campus Student Organization Account (your advisor must approve the account as part of the account approval process.)

- Does your organization have a 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 Involvement Center no longer stores student org bank statements)

✓ **Introduce and Explain the Student Involvement Center Activities, Involvement, and Leadership & Student Senate offices (220/222 Davies Center)**

Explain that the Student Involvement Center and the Activities, Involvement, and Leadership & Student Senate offices provide 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 form 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 sent out via Blugold Connect+ on a bi-weekly basis during the fall and spring semesters.)
- Activities, Involvement, and Leadership Office Staff & Student Senate Office Staff**

Senior Coordinator of Student Organizations – Sara Thommesen

Senior Coordinator of Student Leadership & Greek Life– Katy Rand

AIL & Student Senate Office Manager – Stephanie Pyykola

Student Activities Coordinator-UAC/Summer Events – Joann Martin

Student Activities Coordinator-Artist & Forum/Marketing & Front office Supervisor – Brianna Johnson

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

✓ **Give a Tour of the Student Involvement 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 Organization Makerspace)
- Student Life Resource Library
- Organization Storage Lockers
- Student Organization Reservations – online reservations can be made at www.mymazevo.com (use your uwec credentials to login) or contact [Michael St.Ores](#) (Event Coordinator) in Event Services-Davies 240Q, 715-836-3928)

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