



ECSU Student Center and Student Activities Office *Co-curricular education for student organizational leadership*

OFFICER TRANSITION FOR STUDENT ORGANIZATIONS

The success of a student organization depends on its effective officer transition. You know the scenario; it probably happened to you or someone you know! Perhaps you were handed a set of unbalanced books and a stack of unpaid bills at the end of the year and you spent five hours in the Business Office figuring out what to do. You received a letter from the Student Government Association in October telling you that your organization has been put on probation, and you found out that no one ever told you about the forms necessary for continued recognition and active status. You missed out on having your organization at the involvement fair in the fall because you didn't know your organization had a mailbox in the Student Center where all your mail is sent. Don't let this happen to your organization; provide an effective transition for your organizational leadership.

Following is a list of what to transfer to your new officers. If you discover that your organization can't share some of the information because these items don't exist, it's never too late to start documenting! Share your knowledge of the organization's structure, goals, and past accomplishments as well as your leadership expertise. This would include:

- ◆ Effective leadership qualities and skills
- ◆ Current challenges and helpful ideas, procedures, and recommendations
- ◆ Copies of past Annual Reports
- ◆ Constitution and by-laws
- ◆ Job/committee descriptions
- ◆ Status reports on current and continuing projects
- ◆ Evaluations of previous projects/programs
- ◆ Meeting minutes and agendas
- ◆ Resource or contact list
- ◆ Membership roster
- ◆ Financial records and books
- ◆ Historical records
- ◆ Meet with your advisor together

BEGINNING OF THE ACADEMIC YEAR - FALL SEMESTER

New officers should be aware of the annual renewal process to keep your organization in good standing. At the beginning of the academic year, there are several items a president needs to attend to. Stay on top of things with the following check list:

- Complete the start-up packet you receive at the activities fair. The packet includes the following:
 - ◆ Executive Report form
 - ◆ Advisor Agreement
 - ◆ List of members currently on college database
 - ◆ Student Center Reservation policy agreement

The packet is due at the end of the first month of school. Not completing it on time can have adverse effects on your organization's status.

- Review your organizational constitution and make any necessary changes and/or updates. Submit your updated copy to the Student Activities Office.
- Make plans to participate in the activities fair. It's a great place to reach and recruit first-year students. This is generally held the second or third week of classes. Contact the Student Activities Office for more information.
- Get together with your executive board and set goals for the coming year.

ANY TIME DURING THE YEAR WHEN YOU SWITCH OFFICERS

When you switch officers--any time of the year--there are a few things you need to accomplish to keep the college and your new leadership informed and up to speed.

- Let the Student Activities Office know there has been a change... via a letter, email, or even a phone call, so that the contact information on the web site can be accurate.
- Transfer all applicable items discussed in the first section of this handout.
- Train new officers in administrative functions and procedures required by the college (annual renewal, off campus events, etc.) as well as bookkeeping and budgeting.
- Verify your account balance with the Accounting Office.

END OF ACADEMIC YEAR - SPRING SEMESTER

There are also things you need to take care of before you leave for the summer to ensure that there are no surprises when you return in the fall!

- Reconcile all of your student organization financial records. Pay all your bills; make sure you have enough money in your account for any bills over the summer. Process all disbursements and transfers.
- Notify the Student Activities Office of any outstanding bills so they may be forwarded to you, and leave a forwarding address.

RELATED SAO RESOURCES

- ◆ Money Matters

REFERENCE

Adapted from: St. Norbert College, Department of Leadership, Service & Involvement

*Additional resource handouts are available as well as consultation services.
For more information, contact the Student Activities Office in the Student Center at 465-4450.*