

Officer Transition:

OFFICER TRANSITION TO DO LIST



- Update officer positions in the group's CONNECT page (Note: SSA requires orgs to update any time there is an officer change). To update, go to your Dashboard in the Org Page, then choose Officers. Add new officers and un-check the box "Active Officer" for any officers leaving.
- Grant new officers permission to access the organization email account. For directions on how to do this, visit the [Org Email Access Directions](#) on CONNECT.
- Explain annual requirements for the organization to stay recognized. All organizations must re-register annually in September to stay recognized. This includes updating the org's page on CONNECT and attending the Leadership Summit in September.
- Give new officers access to the key for our org's storage cabinet in the Involvement Center (if you have one) at: <http://cglink.me/s11889>.
- Schedule a CONNECT training for new officers at <http://cglink.me/s11892>.
- Introduce new officer(s) to the organization advisor.
- Discuss the financial status of the organization.
- Share the budget if you received funding from the SSA and how to access it within your org's CONNECT page.
- Get new officers on as signers for your off-bank accounts and/or agency and foundation accounts. Hand over any online passwords, checkbooks, etc. Consider moving funds from an off-campus bank account to an on-campus agency or foundation account for easier access.
- Explain how to reserve meeting/event space on campus for the year AND make sure space is reserved for all future meeting and events. Change the contact on any existing reservations with the Conferences & Events Office in the MSC.
- Review and show new officers where the constitution is saved within CONNECT.

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- Give new officers login info to any online platforms (social media accounts, national affiliation websites, blogs, etc.)
- Introduce and explain the Involvement Center. Explain this office provides support and resources to all student organizations. Feel free to stop by and introduce your new officer(s)!
- Ensure new officers know how to register for recruitment events such as the Backyard Bash and Involvement Fair.
- Show new officers how to maintain an accurate membership roster within CONNECT. Use the Members tab within your Group Page Dashboard.
- Share student org resources from the Involvement Center with new officers - <https://connect.uwstout.edu/involvement/student-org-online-manual>
- Pass along your wisdom! You may not see it as wisdom, but being in a position for a year (or whatever amount of time) is invaluable! You have learned important things along the way that can help future leaders. Mistakes, tips, tricks, ideas and successes.
- Have outgoing leaders **answer questions** to help the incoming leaders.
- Have incoming officers **answer questions** for reflection.
- Develop goals for the coming year. A helpful **goal setting template** can be found on CONNECT.