



UW-Superior Student Organization Officer Transition Checklist

Successful student organizations implement an officer transition plan. To be most effective, officer terms should provide at least one month of overlap so that new officers can work closely with outgoing officers and learn responsibilities.

A smooth transition is the responsibility of both outgoing and incoming officers. Use this checklist to train new officers, close out the outgoing term, and maintain consistency year to year.

1. 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
- Current constitution and/or by-laws
- Officer position descriptions and committee lists and descriptions
- Updated member and officer roster (complete this in 'Jackets Connect')
- Contact information for important people and offices on campus
- All financial records (current year budget and expenses, next year's SUFAC allocation, etc.)
- Log-in information for online resources, email accounts, and social media accounts (passwords, admins, access)
- List of basic annual procedures and/or calendar of events
- Evaluations and notes from previous and current projects and events
- Meeting minutes and agendas
- Historical records (photos, posters, news coverage, awards, etc.)

Tip: Keep these materials in a your ['Jackets Connect'](#) org portal under "Files" and be sure your advisor has access. It helps when an officer graduates or leaves unexpectedly.

2. Update rosters and review [‘Jackets Connect](#)

Visit ‘Jackets Connect show new officers that this is where they should be managing the organizations’ business:

- Update the organization’s officer/member roster
- Event creation and promotion
- Attendance tracking
- Purchase and travel requests
- Budget racking
- File storage
- Communication with members
- Website creation

3. Introduce new officers to the advisor

- Schedule a meeting with new officers and advisor to discuss how the advisor will work the organization going forward.
- If possible, have incoming officers shadow outgoing officers (especially for President and Treasurer responsibilities).

Suggested topics for outgoing and incoming officer 1:1s:

- Purpose of the position and goals for the next year
- Review of the past year (successes, challenges, improvements)
- Things you wish you knew starting the role
- Walkthrough of the position files
- Open Q&A

4. Review budgets, funding sources, and campus cost center

- Discuss the current financial status of the organization
- Share where the organization received money from this year
- Share the SUFAC budget allocation for next year
- Discuss which fundraisers worked and which did not

5. Review programs, projects, membership, and recruitment

Programs and activities

- What activities and programs did you sponsor?
- How effective was each program?
- Which activities should be continued, revamped, or dropped?

Membership and recruitment

- Do you have too few, enough, or too many members for your goals?

- What recruitment activities worked and what did not?
- Why did members stay engaged, or why did they leave?

Officer teamwork and structure

- Do officers understand their roles and responsibilities?
- Is the workload balanced?
- What would you change about how the executive board worked together?

6. Plan next steps (meeting and/or retreat)

Ensure the outgoing and incoming officers meet together to reflect, discuss goals, and answer questions. A retreat can work well for:

- Goal setting
- Brainstorming ideas
- Setting expectations for each officer
- Evaluating programs and events
- Team development

Tip: Include the advisor in part of the meeting or retreat so expectations can be set for the next year.

7. Introduce [Student Involvement](#) and campus resources

Explain that the Department of Student Involvement provides support and resources to all registered student organizations

Important ideas to discuss:

- **Annual Re-Registration:** All student organizations must re-register each year by October 15th by completing the re-registration form in 'Jackets Connect
- **Mandatory Student Organization Leadership Training Course (Canvas):** This training course must be completed each fall by all recognized officers as part of re-registration.
- **'Jacket Fest: Student Involvement Fair:** Register for this recruitment event within the first few weeks for the fall semester.

Student Involvement Staff:

- [Allison Garver](#), Director: involvement@uwsuper.edu, 715-394-8444

Show campus resources to new officers (as applicable):

- Meeting rooms
- Organization storage
- Student Involvement Office (YU 155)