

CLUB OFFICER TRANSITION CHECKLIST

The most successful clubs transition their Officers every year. A successful transition process ensures the club continues seamlessly and passes along pivotal information, operations, and traditions to incoming officers, so that next year's officers can build on the knowledge gained, rather than starting from ground zero.

UNM CLUBS ANNUAL TIMELINE

January/
February

- Hold Officer Elections!

January/
February

- Attend a Budget Workshop
- Apply for ASUNM/GPSA Funding!

February /
March - April

- Train & Mentor New Officers for 2-3 Months!

July 1st

- Approved ASUNM/GPSA Funds Available for Use!

August

- Sign-up up for SAC's Welcome Back Days Tabling Event! Recruit Members!

August/
September

- Re-Charter Your Club!
With SAC & Recreational Services

TIPS FOR A SUCCESSFUL TRANSITION

1. **Election Guide:** Follow SAC's [Officer Election Guide](#) to get started!
2. **Mentorship:** Officer Terms should provide at least **one to three months of overlap** so New Officers can shadow, learn, and be mentored by the Leaving Officers.
3. **Once New Officers are Elected:** Schedule a [Challenge Course & Leadership Development Session](#), with UNM Recreational Services' Outdoor Adventure Center, for the New and Leaving Officers, and the Club's Faculty Advisor to participate together. This session can help New Officers understand their roles and begin building their next Leadership Team. Leaving Officers should openly share what they believe went well during their year(s) of leadership and what could be improved. Encourage new officers to begin working together and discuss a plan of action for the upcoming year.
4. **Introduce On-Campus Resources:** Schedule a time to walk around campus with the New Officers and introduce them to important people who can serve as key resources (Faculty Advisor, SGAO, Recreational Services Club Sports Coordinator, Student Activities Center, ASUNM, GPSA, etc.).
5. **For Off-Campus Resources:** Formally Introduce New Officers to Key Resources Off-Campus via Email (Key Sponsors, Past/Current Coaches, Mentors, Alumni Groups, Referees, Scrimmage Groups, Tabling Events, etc.)
6. **Share ANY & ALL Documents:** See the next page for a full list.
7. **New Officers: Recognize Your Leaving Officers!** Organize certificates, gifts, Thank-you cards, etc.

THE BASICS

1. Review the Student Organization [SAC](#) Handbook & the Club Sports [Recreational Services](#) Handbook!
2. Explore **Helpful [Club Resources](#)** offered by the Student Activities Center (SAC)
3. Explore **Recreational Services [Club Resources](#)** too!
4. Seek out the [Outdoor Adventure Center](#), Lobo Bike Shop, Challenge Course & Getaway Adventures!
5. Share **Login Info and Instructions** to online platforms: Club e-mail, Webpage and Social Media, Online Storage (Google Drive, etc.), & Communication Apps/Tools.
6. Sign-up to **Recruit New Members** at the [Welcome Back Days Event](#) in August!
7. Learn How to [Charter](#) or Re-Charter the Club in August / September.
8. If the club has **Undergraduate Students**, Attend an [ASUNM Budget Workshop](#) & Apply for Funds.
9. If the club has **Graduate Students**, Attend a [GPSA Budget Workshop](#) & Apply for Funds.
10. Need help **submitting a budget request?** Contact your Club's [Sponsoring Senator](#) through ASUNM.
11. Introduce New Officers to the **Student Government Accounting Office ([SGAO](#))** and how to deposit / withdraw funds.
12. Learn how to **Reserve Meeting / Event Space** on campus for the year on [EMS](#) and [SAC](#).
13. **Finish Important Email Correspondence** and pass any unfinished items to New Officers
14. Utilize [Campus Catering](#) when needed.

SHARE ANY AND ALL DOCUMENTS

Share documents electronically, so New Officers can easily make updates or changes.

One Drive or Google Drive are great ways to store documents online. One Drive is linked to your Lobo Mail Account & would be easy for SAC to help recover your UNM account, incase passwords are not transferred.

Below are ideas of what to include:

- Organize & Put All Files, Notebooks, Binders, and Electronic Files in an Accessible Place
- Constitution/By-Laws: Mission, philosophy, goals and purpose of the organization
- Organization History & Past Members
- Membership Contact List (phone, e-mail)
- Prospective Member List (phone, e-mail)
- Information on Dues & Who's Paid/Not Paid
- Past & Current Budgets/Financial Reports, Tacking Expenses / Income, Spreadsheets & Templates
- Receipts
- Document Passwords (club email, google drive, social media, website, etc.)
- An Asset List of the Club's Supplies and Equipment, and Where to Find Them
- A Master Contact List of Helpful People (e.g. Faculty/Staff Advisor, Coaches, Active Alumni, Sponsors, Vendors, Referee Assigner, Helpful Game Personnel, Governing Body Contact, Club Contacts at Other Schools, Van Rentals, Travel Contacts/Businesses, etc.)
- Meeting Minutes
- Agendas
- Election Process and Timeline
- Calendar of Important Events, Trainings, and Deadlines
- Special Events (checklist for any past events or programs, event approval process)
- Fundraiser Events
- Membership Recruitment Events (e.g. Welcome Back Days Tabling Event every Fall Semester)
- Tabling & Marketing Materials (Poster/Flyers, Photos, Any Past Print Publications, etc.)
- Tournament Structure (e.g. Schedules/Itinerary, Teams Played, Key Contacts, Hotel & Transportation)
- Practices Plans
- Provide Tips for Running Practices, Events or Meetings
- Field/Court/Meeting Room Reservations
- Officer Position Descriptions
- Committee Position Descriptions
- Finish Important Email Correspondence

PASS ALONG YOUR WISDOM!

Think: What would you have wanted to know when you took office?

- Using your hindsight, identify the areas of responsibility, people, details, phone numbers, etc. you wish someone had told you when you took office. Share any tips, tricks, or tools that helped you be successful.
- Review the organization's Constitution, By-laws, and Goals and Outline any areas needing attention or revision.
- Identify the Club's Culture
- Ideas for Improvement
- Recruitment & Fundraising Ideas
- Prepare an end-of-the-year report/summary of the club's goals, activities, and accomplishments.
- Plan to be available, even if limited, for consultation or questions (At minimum: by e-mail).

REFELCTIONS

Leaving Officers: Reflect on your experience. What else can you share?

1. What were your major responsibilities in your role?
2. What were your favorite parts?
3. What were the most challenging parts? How did you overcome them / or not?
4. When you needed help, what resources did you rely on?
5. Which administrators / staff / people were most helpful to you? (Supply contact info)
6. What events or collaborations were most successful?
7. Are there any projects, traditions, or ideas you hope are continued?
8. If you had another year in the position, what would be your priority / vision for the club?
9. If you could do it all over again, what would you change / improve?
10. What is the most valuable thing you learned?

Alternative: Leaving and Incoming Officers can participate in a shared reflection session to review past goals, set new realistic and relevant goals for the upcoming year, and reinforce productive communication methods. This can be done during a [Challenge Course & Leadership Development](#) Session. Personalize your course to fit your club's goals. Schedule the course with UNM Recreational Services' Outdoor Adventure Center, challengecourse@unm.edu. Charles Gwinn, is the Outdoor Program Specialist who manages the course. **Be sure to identify yourselves as a Chartered Sport or Recreational Club for a possible discount.*

FUNDING

Help New Officers make sound financial decisions by reviewing the club's current financial documents. If your club has a bank account off-campus, ensure access to the account stays within the club or transfer money to an on-campus bank account (recommended) with the Student Government Accounting Office (SGAO). Some topics to discuss are below:

1. How is the club financially?
2. Where do you get additional funding from?
3. What fundraisers have been successful / unsuccessful?
4. Are there any upcoming large purchases, like jerseys, equipment, or travel?
5. How are purchases made? How do you deposit dues?
6. How do you hire and pay a Referee? How long is the process?

INCOMING OFFICERS

1. **Read through transition documents.** Become familiar with the general history of the club and its recent activities. Remember you need to know all the little details as well as the big picture.
2. **Identify what training and guidance you may need** from the leaving officers, before their term ends.
3. **Make appointments with key people** and introduce yourself (e.g. Your Club Advisor, Former Club Leaders, The Student Activities Center, and Recreational Services Club Sports Coordinator, etc.).
4. **Document All Club Activities** in a way that can be easily shared with the next officers who follow you, like OneDrive or Google Drive. (OneDrive is attached to your Lobo Mail).
5. **Recognize Your Leaving Officers:** Organize certificates, gifts, Thank-you cards, etc. to show your appreciation for their time and effort of running the club, and remind them how valued they are!

References:

- California State University San Marcos: Student Leadership & Involvement Center, Retrieved January 25, 2023
Ithaca College: Transition Guide for Student Organizations, Retrieved January 25, 2023
Leadership University of Wisconsin-River Falls Office of Student Life, Retrieved January 25, 2023
Ohio University: Campus Involvement Center, Retrieved January 25, 2023
Pratt Institute: Student Affairs, Retrieved January 25, 2023
San Diego State University Office of Student Life, Retrieved January 25, 2023

When in doubt, plan ahead!

Questions?

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