

# Student Organization Officer Transition Guide

*Outgoing Student Organization Treasurer*



**SOS**  
Student **Organizations**  
and **Service**



Thank you for taking the time to read this Officer Transition Guide!

The purpose of this guide is to help outgoing officers provide a smooth transition of power for their student organization. Our goal is to help officers set their organization up for another successful year.

In this document, there is a section for the outgoing treasurer's to review. We hope this will help lead your conversations as you go through this transition. Please read the sections relevant to you very carefully and in its entirety.

If you have any questions about anything regarding Student Organizations here at MTSU, please do not hesitate to reach out! We are here to help.

### **Student Organizations and Service Staff**

Jackie Victory, Director of Student Organizations and Service

Jackie.Victory@mtsu.edu  
615-898-5812  
Student Union 330

Molly Mihm, Graduate Assistant

Molly.MihmSOS@mtsu.edu  
615-898-5812  
Student Union 330

Alayna Hurst, Graduate Assistant

Alayna.HurstSOS@mtsu.edu  
615-898-5812  
Student Union 330

 [www.mtsu.edu/sos](http://www.mtsu.edu/sos)

 @MTSUSOS

 615-898-5812

 Center for Student Involvement  
and Leadership  
Student Union 330

# Outgoing Treasurer

Congratulations on finishing your term as Treasurer of a student organization! Thank you for serving your fellow students. As you finish up your term, we strongly recommend you meet with the incoming treasurer in order to ensure a smooth transfer of leadership. This page contains questions to ask the incoming treasurer, important processes to tell them about, and steps for you to complete before finishing your term.

## Questions to Ask

- Why did you want to run for this position?
- What are three things you would like to accomplish during your term?
- Which responsibilities do you anticipate having?

## Important Items to Cover

- Advisor's name and contact information
- How to navigate MyMT.
  - [How to update the roster.](#)
  - How to add events.
  - [How to update the About page.](#)
- [Re-Registration](#)
  - Happens annually and must be completed in order to operate on campus.
  - MyMT Form.
  - Advisor Agreement
  - Finance Report
  - Orientation Session
    - Presidium Retreat in August
- Student Activity Fee Funding
  - Application deadline & [where to find information.](#)
- The Student Organizations and Service Website
  - [Student Organization Handbook](#)
  - [Sample Constitution](#)
  - [Reserving Space](#)
- Important Login Information
  - Your club's social media pages.
  - Your club's email address.

## Before your term ends, be sure to...

- [Update the officer roles on MyMT.](#)
- Transfer any important documents (Constitution, roster, budgets, passwords, etc.) to the new officers.
- Share important financial information (fundraising information, payment trackers, etc.)

# Outgoing Treasurer Worksheet

*[To be completed by the outgoing officer before transition meetings and training sessions]*

## **Student Organization:**

**Name:**

**Phone Number:**

**Email Address:**

**Date:**

**Directions:** Please think through and respond to the following questions regarding your responsibilities; this information will be helpful to your successor. Lessons learned from this reflection can be shared with incoming officers verbally or in written format.

**The responsibilities of my position included:**

**List other officers with whom you worked, and the projects involved:**

**List what you enjoyed most and least regarding your position:**

**Who was the most helpful in getting things done? Who were good resources? List other aids that helped complete your job:**

# Outgoing Treasurer Worksheet Cont.

*[To be completed by the outgoing officer before transition meetings and training sessions]*

**List any problems or disappointments you encountered as a part of your position and suggest ways of avoiding or correcting them. What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?**

**What could you have done to make this a better experience?**

**List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, university / college officers, community resources, etc.**

**Create a timetable/list important dates related to your position. Provide suggestions for increasing efficiency and effectiveness.**

**What should be done immediately during the summer? In the fall? In the spring?**

# Outgoing Treasurer Worksheet Cont.

*[To be completed by the outgoing officer before transition meetings and training sessions]*

**List Contact Information for the Faculty Advisor, Business Office Staff, Bank Staff, Outside Consultants, or any other helpful resources used in Student Organization Operations.**

**List any financial accounts maintained by the organization.**

- a. Off Campus Bank Account:
- b. On-Campus Agency:
- c. Paypal:
- d. Venmo:
- e. Zelle:
- f. Cash App:
- g. Etc:

**Provide additional financial information:**

- a. Student Organization M#:
- b. Student Organization Dues:
- c. Student Organization Fundraising:
- d. Student Activity Fee Funds:
- e. Student Organization Bank Balance:
- f. Additional Student Organization Revenue:
- g. Etc:

**List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.**