

Student Organization Officer Transition Guide

**Incoming
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 incoming officers provide a smooth transition of power for their student organization. Our goal is to help both sets of officers set their organization up for another successful year.

In this document, there is a section for the incoming treasurer 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

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Incoming Treasurer

First, congratulations on being elected as treasurer of your student organization! This is a great accomplishment. In order to have a smooth transition of power, we recommend meeting with the outgoing treasurer. Below you will find a checklist of processes and details to know, questions to ask, and people on campus to get-to-know. When meeting with the outgoing president, talk through this checklist and make sure you understand each item.

Questions to Ask

- What were your goals for your term? Which ones were accomplished?
- Which goals do you think the club needs to continue to work on? How do you measure your success in reaching goals?
- What is the best advice you, as an outgoing officer, can share?
- What should I be working on over the summer?
- What is the process for depositing/withdrawing money from the account(s) we hold?

Documents to Ask For

- Finance-related notebooks
- Binders
- Budgeting/financial documents for the past few years (if applicable)
- Account Information
- Transaction logs
- Files & Records
- Any electronic documents/folders
- Calendars, timelines, budgeting deadlines, deadlines for applying for university funding and debit cards.
- Assessment of profits, losses, and current assets such as supplies, inventory, materials, and resources.
- Login information for school and financial institution accounts.
- Templates for sponsorship letters and thank you notes to donors.

Other Important Items

- The primary responsibilities of your role.
- The annual re-registration process
 - Must be completed in order to operate on campus!!!!
 - MyMT Form
 - Advisor Agreement

- Finance Report
 - Orientation Session
 - Presidium Retreat in August
- The [Student Activity Fee](#) process.
- How to access MyMT.
 - [How to update the roster.](#)
 - How to add events.
 - [How to update the About page.](#)
- How to access the organization's social media and email accounts.
- The advisor's name and contact information.
- How to find the [Student Organization Handbook](#).
- How to [reserving space](#).

Important Campus Contacts

- Jackie Victory, Director of Student Organizations & Service
 - Jackie.Victory@mtsu.edu
- Danielle Bratton, Coordinator of Student Organizations & Service
 - Danielle.Bratton@mtsu.edu
- Quintina Burton, Director of Event Coordination
 - Quintina.Burton@mtsu.edu
- Justin Reed, Director of the MT Unions
 - Justin.Reed@mtsu.edu
- Sadie Katie Hampton, Assistant Director of MT Unions Operations
 - sadiekatie.hampton@mtsu.edu

See next page(s) for transition-guide worksheets!

Incoming Treasurer Worksheet

The new officer should ask these questions to the outgoing treasurer to gain a solid understanding of the position.

Things specific to the position I need to know about (forms, duties, etc...)

What are things I should do over the summer? fall? spring?

What do you consider to be the responsibilities of your position?

Where can I find Student Organization Files? (constitution, roster, etc.)

Things I need to know about working with my advisor...

Incoming Treasurer Worksheet

The new officer should ask these questions to the outgoing treasurer to gain a solid understanding of the position.

What problems or areas will require attention within the next year?

What is the contact information for the Faculty Advisor, Bank Staff, Business Office Staff, Outside Consultants, or any other helpful resources used in Student Organization Operations.

What financial accounts are maintained by the organization? List here.

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

Is there any additional financial information that I should know? List here.

- 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:

Here is a place to ask any other questions or to list any other suggestions your feel successor says that would be helpful in carrying out the responsibilities of this office.