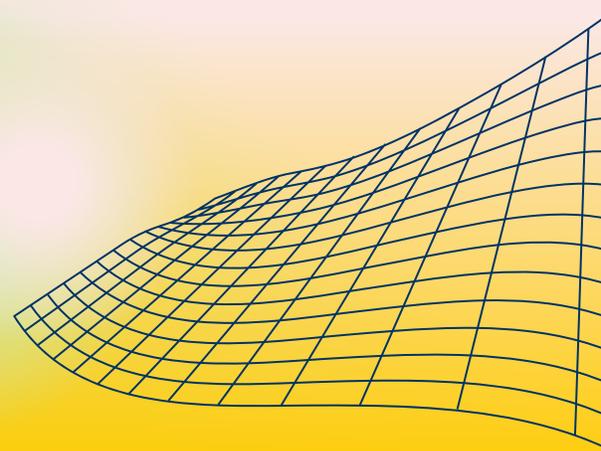


# STUDENT ORGANIZATION TRANSITION GUIDE



This is a helpful document for outgoing officers for registered student organizations under the Office of Student Engagement to use as a resource for the new term officers. In this guide students will be able to be clear and concise on the mission of their organization, goals when they decided to organize and continuing to create a community for their members throughout the years.

## Definition of Terms

- **Office of Student Engagement** The office that oversees all administrative tasks for all Registered Student Organizations at Marquette University. ie, trainings, onboarding, access to Presece (Marquee). Also called OSE.
- **Transition** Intentional change for an organized process of leadership, documentation and operational responsibilities to ensure continuation of registered student organizations.
- **Executive board** Small team of elected student leaders responsible for the operations and day to day function of the registered student organization. Also called E-board.
- **Officer** Elected undergraduate student to a leadership role with their registered student organization.

# Outgoing Officer Checklist:

**Step 1:** Send the E-Board New Officer YR 2026-2027 email to the Office of Student Engagement at [engaged@marquette.edu](mailto:engaged@marquette.edu). The email should be sent out at least one week prior after Officer Election results have been confirmed and positions accepted.

- Subject: **Registered Student Organization Name**- New Eboard YR 2026-2027
- Use the template below to update the OSE office. All wording in red needs to be updated with information about new e-board.

"Hello,

*Name of Registered Student Organization* held election and confirm the following position will now be held by a new e-board.

*Current President- First and Last Name.....Elected President-First and Last Name*

*Current Vice President-First and Last Name.....Elected Vice President-First and Last Name*

*Current Treasurer-First and Last Name....Elected Treasurer-First and Last Name*

*Current Officer-First and Last Name..... Elected Officer-First and Last Name*

*Current Officer-First and Last Name..... Elected Officer-First and Last Name*

The new e board will take office effective **Start Date**.

Thank you,"

**Step 2:** Update your presence page with New Officers list in their elected positions.

**Step 3:** Update account holders on Town Bank account for any accounts held by your student organization.

**a. This must be done by the current officers before the new incoming officers can transition into their positions.**

b. The Letter of Direction will only be shared once the E-Board New Officer YR 2026-2027

**Step 4:** Host transition meeting to review the following:

- a. Any annual events hosted by your student organization
- b. General meeting information in those occurs.

c. Current discussion points from last meetings or email correspondence.

**Step 5:** Collect all current documentation for the next e-board in a transition binder.

a. Current constitution

b. Notes or files used by e-board

**Step 6:** Share transition binder copy digital or physical with OSE.

a. Reminder emails will be sent to the new e-board about requirements and attendance for Org Essentials in the Fall Semester

**Step 7:** If possible, have new incoming officers shadow with the current officers.

**Step 8:** Complete the outgoing officer worksheet. Share with new e-board members and OSE. This can be added to the transition binder.

# Outgoing Officer Worksheet

**Name:**

**E-board Position:**

**Registered Student Organization Name:**

**Term Dates:**

**Email:**

**Time commitment: Please list the weekly/monthly tasks associated with the position.**

**SEASONS OF THE POSITION:** Please list any times of the calendar year that are busy and/or quiet for this position. For example, if your position is very busy during the fall, but quiet during spring, please indicate that. Please include specific deadlines you may have had (if applicable).

**RESOURCES:** Please list any resources (including web links) that would be helpful to someone in this position.

**SUPPORT:** Please list the other individuals or roles that are helpful for someone in this position, and describe why. For example, when this position collaborates closely with a specific member of the Marketing Team, please indicate that.

**PROGRAMS AND PROJECTS:** If this volunteer position creates programs or initiatives, please list all of the programs that you coordinated while serving in this position. If you did not have specific programs, please indicate what you contributed in this position.

**SUCCESSSES, CHALLENGES, AND FUTURE PROJECTS:** Please list any successes or challenges you encountered. Are there any initiatives or projects that will need to be continued after the transition?

**BUDGET:** Please share any information or documentation of clubs current fiscal year. Any information on fundraising, Townbank account information. If funding is requested each year to MUSG please make sure you share the most current dates of the next SOF training.

**LESSONS LEARNED:** Please indicate any helpful tips or information that would help a future coordinator to plan and navigate serving in this position.

**LAST STEPS:** Before your transition is complete, please contact the person that is succeeding

you in the position. It is encouraged that there is a one-on-one conversation with this person to assist with in the transition. Please share this completed document (and any other relevant documents for the position) with leaders of your organization as appropriate.