



..... *A LEGACY SERIES.*

OFFICER TRANSITION GUIDE



STUDENT ENGAGEMENT
STUDENT LIFE | UNIVERSITY OF FLORIDA



***"IF YOU'RE GOING TO LIVE,
LEAVE A LEGACY. MAKE A
MARK ON THE WORLD THAT
CAN'T BE ERASED."***

-MAYA ANGELOU

Century Tower

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**Adapted from the U. of Southern Mississippi Leadership and Student Involvement Student Organization Officer Transition Guide.*

LETTER TO OUR LEADERS



Dear Student Organization Leader:

Too often, Student Engagement has seen student organization leaders dedicate themselves to successfully leading their groups for an academic year and at the end of their terms, leave the positions without time spent making sure the incoming officers have the opportunity to build a strong foundation of knowledge.

When that happens, all the information regarding the previous year's lessons learned are not passed on to the incoming officers, thus slowing down their progress as leaders and the progress of the organization as a whole. Without taking the time to effectively transition incoming officers, organizations lose the opportunity to continue momentum gained in the previous year. Time that could be used moving the organizations forward and accomplishing new goals is spent catching up.

This packet is designed to provide student organization leaders with the tools to successfully transition outgoing and incoming officers. The forms in this packet are meant to empower students to have intentional conversations with one another to minimize the effects of turnover within student organizations, increase organizations' success, and continue momentum accomplished by groups during the previous year. The Student Organization Officer Transition Guide is designed to be used in sections:

- ☐ Outgoing Officer Transition
- ☐ Incoming Officer Transition
- ☐ Transition Meeting Basics
- ☐ Transition Checklist

The forms in the packet are designed to be used individually as well as part of the greater packet – we encourage you to tailor it to fit the needs of your organization.

We hope you utilize this packet to navigate a successful transition. Please contact our office at 352-392-1671 or email us at studentengagement@ufsa.ufl.edu.

Student Engagement

DEFINING TRANSITION



An intentional process for a seamless transfer of organization responsibilities that builds emerging leaders, prepares incoming leaders, recognizes the work of outgoing leaders, and positions the organization for long-term success.

Times of transition impact various parties within the organization. Most notably, these key players during transition include:

- Incoming Officers
- Outgoing Officers
- Advisors
- Campus & Community Partners
- Local or National Affiliates

REASON FOR TRANSITION



Organizations will find that transition can occur for various reasons. Most commonly, an outgoing officer may be due to reaching their term limit, graduating, leaving the organization, or impeachment.

For times of transition that do not fulfill the full-term requirements of the officer role, organizations should turn to their constitutions to review their own individual processes of replacing that officer role.

For times of transition during a term cycle – elections – organizations should follow their election process as outlined in their constitutions.

OUTGOING OFFICER TRANSITION



CHECKLIST

As an outgoing officer in your organization, you play a vital role in the success of the transition process to new leadership. Preparing to transition out of a position and bringing a new officer into your role is a culminating moment for your Leadership Experience. Consider the following items as you prepare for the transition.

- ☐ Complete the 360 Assessment with your officer cohort to reflect on your experience.
- ☐ Keep ongoing records of happenings and changes during the year.
Ex. Awards Won, Meeting Minutes, Organization Calendar, Financial Records, etc.
- ☐ Reflect on this last year, write a letter to your incoming officer.
- ☐ Update documents to include any changes from the year.
Ex. Important Contact List, Organization's Constitution, Bylaws and Mission, Advisee Contact Information, etc.
- ☐ Revise Officer & Committee position descriptions to reflect current roles as needed.
- ☐ Organize all files and documents on the share drives or hardcopy.
- ☐ Collect all the usernames and passwords for relevant accounts to pass on.
- ☐ Update the Officer Roster on GatorConnect.
- ☐ Change any Bank Account/Docutraq information to reflect the new officers.
- ☐ Complete Re-Registration if within your transition window.
- ☐ Develop an action plan and timeline for new officer transition training, including but not limited to:
 - Leadership meetings to attend
 - Trainings to complete
 - Introductions to key people
 - Transition meetings
 - Financial information
 - Shadowing of position
 - Re-registration process
 - Create a Transition Binder (See Next Page)

OUTGOING OFFICER TRANSITION CHECKLIST CONT.



To ensure a smooth transition consider using a transition binder. Below are a few things that your binder should contain.

- ☐ Organization Constitution
- ☐ Student Engagement & UF Policies and Regulations
- ☐ Student Engagement Student Organization Handbook
- ☐ Student Engagement Student Organization Transition Guide
- ☐ Budget Information
- ☐ Year – End Reports
- ☐ Evaluations
- ☐ Organization Event Calendar
- ☐ Meeting Agenda's and Meeting Minutes
- ☐ Contact Lists
- ☐ Resource Lists
- ☐ Name & Contact Information of Outgoing Officers
- ☐ Do's and Don'ts and Helpful Hints

OUTGOING OFFICER TRANSITION



OUTGOING OFFICER 360 EVALUATION

Part of being able to plan a successful officer transition is to reflect on your role as an officer for your organization for the past term. A 360 Evaluation provides comprehensive feedback and reflection for yourself and your relationship with your team during the course of your time in office. Use the following questions to ask yourself – your advisor/s – at least two officers – at least two members to complete the questionnaire anonymously.

Name of Officer being Evaluated: _____

Role of Officer in the Organization: _____

Period of Evaluation: _____ through _____

<i>This Officer...</i>	Strongly Agree	Agree	Slightly Agree	Slightly Disagree	Disagree	Strongly Disagree
Displays enthusiasm for their role as an officer						
Provides a good example of leadership to others						
Communicates effectively with others						
Provides valuable suggestions and insights to the organization						
Follows through on responsibilities assumed						
Produces high quality work						
Motivates others to work effectively						
Displays a sense of professionalism in role						

Officer Strengths:

Officer Areas of Growth:

OUTGOING **OFFICER TRANSITION**



OUTGOING BOARD EVALUATION

This worksheet is designed to give your executive board/ leadership team the opportunity to reflect on your time collectively in office. Use the following prompts to lead a discussion at your final board meeting to assess the entire groups progress throughout the year.

What was our greatest achievement as a team?

What programs or governing practices have been productive for us?

What was our greatest barrier as a team?

How have we developed younger members to be successful future leaders of the organization?

Three goals we would have liked to accomplish for our organization.

Three goals we would like our successors to achieve in their new roles.

OUTGOING OFFICER TRANSITION



OUTGOING OFFICER 360 EVALUATION

To be completed by the outgoing officer before transition

Position Title: _____

Name: _____

Date: _____

Phone Number: _____

Email Address: _____

Directions: Please think through and respond thoughtfully to the following questions regarding your responsibilities as an officer for your organization. This information will be helpful to your successor and organization success as a whole.

The responsibilities of my position included:

Other officers I worked closely with on certain projects were:

What I enjoyed most and least about my role was:

Who was the most helpful contact for my role?

What were the main resources I used to fulfill my duties?

Things I wish I had known before stepping into this role:

OUTGOING **OFFICER TRANSITION**



OUTGOING OFFICER 360 EVALUATION CONT.

My greatest success in this role? Why was it so successful?

The biggest challenge of this role? What could I have done to navigate it better?

List of important dates/deadlines for this position.

What should immediately be done during the next semester?

INCOMING

OFFICER TRANSITION



THE BASICS

Congratulations! You are now stepping into a new role for yourself as a leader for your organization. You may begin asking yourself, now what? What do I do in my role, where do I start, what should I be doing? Well, the good news is these are all fantastic questions to be asking your predecessor!

As an incoming officer, your main task is to ask as many questions as you can to gain a solid foundation of your role. Start off by reviewing your position description in your organization's constitution. From there, consider the following plan to learn as much as you can about your new role:

- ☐ Schedule Officer Transition Meeting with outgoing officer.
- ☐ Make a list of any questions you may have, about the role, tasks, feedback, the high's and lows of the role – really use this time to learn from your outgoing officer.
- ☐ List out potential resources you know of that will aid you in the success of your new officer role.
- ☐ Connect with the Advisor of the organization to introduce yourself and ask any relevant questions.
- ☐ For Presidents, Vice Presidents & Treasurers, complete the online officer training modules available on myTraining.
 - Student Officer Training – Organization Management & Responsibilities
(UF_SAI100_OLT)

INCOMING

OFFICER TRANSITION



OVERVIEW OF YOUR ROLE AS A STUDENT

For most of you, this may be the first time you are in a leadership role amongst your peers. This can be both very exciting and very intimidating, trying to identify the balance between your friendship and your leadership. Below are some best practices to keep in mind as you step into this new role to help you be successful during your term.

Work on the morale of your group members. Unless they feel good about their roles, your group members will not be as cooperative and productive as they could be.

Expect any changes to be accepted gradually. Sometimes we expect people to accept changes overnight that we have been thinking about for months. Remember that it is almost impossible to change people... they usually must change themselves.

Be available to help those who want your help. When we attempt to force our ideas of assistance when it hasn't been solicited, we risk building resistance among our group.

Let your group members determine the group's purpose. Unless group members have a say in what is to happen, their participation will be half-hearted at best.

Emphasize the process for working through problems rather than the final result. Your desired results may change as your group changes. An open channel of communication that involves all group members will help you incorporate these changes.

Approach changes through cooperative appraisal. When change is based on evidence, it reduces the chances for a win-lose situation. The decision will be based on what is right, rather than who is right.

Encourage brainstorming and creativity. Provide feedback and support for new ideas and avoid penalizing for mistakes made for the sake of experimentation.

Share decision-making regarding policies and procedures. By emphasizing how to solve problems, and involving your members in these decisions, you will create deeper commitment in your members.

INCOMING

OFFICER TRANSITION



OVERVIEW OF YOUR ROLE AS A LEADER CONT.

Recognize criticism as the first step individuals take in assuming responsibility. Use criticism as a chance to solicit suggestions for improvement.

Share the glory. You cannot expect enthusiastic participation if you take all the credit.

Have confidence in the ability of your group. People tend to live up to our expectations, be they high or low.

Be sure your group has a common purpose. Structure meetings so that issues of common interest are discussed with the whole group, and individual concerns are addressed at other times.

Trust the motives of all group members. Attend to every suggestion as a sincere one that deserves a sincere response.

Don't set yourself up as infallible. Be honest and admit when you lack an answer. Don't be afraid to be human.

Be specific. Communicate exactly what you expect and think.

Be socially sensitive. Avoid being witty or funny at the expense of group members.

Use the inquiry method. Use questions to get information and define issues.

Be impartial. Play no favorites and give all group members equal chance to participate.

Promote group cohesiveness. Make all group members feel as if they belong.

Manage conflict, don't ignore it. Bring conflict into the open, and concentrate on issues, behaviors, and facts rather than personalities.

INCOMING OFFICER TRANSITION



INCOMING OFFICER TRANSITION WORKSHEET

As an incoming officer, your first duty is to ask as many questions as possible to gain a comprehensive understanding of your new role. Use this worksheet as a reference for some common questions you can be asking yourself, your predecessor, your other incoming officers, and the organization as a whole.

What are some specific roles about this position I need to know about?

What should I begin doing my first month in this role?

Who are some people/offices I should get to know?

What are some services/resources I need to know about?

What are some things I should know about working with my organization advisor?

What are the responsibilities of this role?

INCOMING ***OFFICER TRANSITION***



INCOMING OFFICER TRANSITION WORKSHEET

**What expectations do you have of the executive board/
leadership team?**

**What expectations do you believe your members have of
you?**

**What are Student Engagement's expectations of me as
an officer for this organization?**

Additional questions?

INCOMING

OFFICER TRANSITION



PERSONAL GOAL SETTING

Before you begin goal setting with the other officers and members of the organization, it may be helpful for you to reflect on your own goals as an individual in the organization. These can be personal, professional, or leadership goals, & may vary in length or degree. Some things you may want to ask yourself could include: the atmosphere you wish to create in your organization, programming ideas, the people you will be working with, budgeting, development, etc.

To start off, think about what you want to see happen this coming year as a result of your time in office.

Now, list all the tasks you can do right away: (be specific – how, when, where)

Next, think about the tasks you can get started on in the next month or two:

Reflect back on your meeting with the outgoing officer for this role; what are some things they indicated you should do right away?

INCOMING

OFFICER TRANSITION



PERSONAL GOAL SETTING CONT.

Now ask yourself; how do I get started? Is there anything I can do before tomorrow?

Finally, ask yourself; what can I realistically have accomplished in one week? One month?

Considerations

Take a look at the tasks you have outlined above and reflect on the tasks as well as the goals of the organization. Are your goals consistent your understanding of the purpose of the organization? How can your organization turn these goals into action?

TRANSITION

MEETINGS



INTRODUCTION

A Transition Meeting, for organization purposes, can be defined as a single or series of transparent conversations between incoming and outgoing officers of your organization promote organizational efficiency, success, and longevity. Having transition meetings allows gives outgoing officers a time to reflect on the ways in which their leadership skills changed as a result of their time in a leadership position and offers the incoming officer support as they transition into the new role.

Transition begins the moment a new officer is elected to their position. Once this happens, the incoming and outgoing officers should make a point to contact the other person in order to schedule a meeting. Schedule your meeting for as soon as you can to have a smooth transition process – the earlier you can do it, the better. Once your meeting is scheduled, take a look at what you should do before the meeting and do those things. After you prepare for the meeting, you'll decide together about how best you'll continue your transition.

Things to consider during your Transition Meeting:

- ☐ Go over job description in detail and ask yourself “Is anything missing from this job description?”
- ☐ Discuss any ongoing projects and provide context - where you are in this process, what still needs to be completed and what is in the works right now?
- ☐ Share contact information of important people to the organization such as the Advisor, Other Officers, Student Engagement, Student Government Finance, Office of Event Services, etc.
- ☐ Develop Communication method between the other new officers. What will be the main method of communication amongst one another?

TRANSITION

MEETINGS



INTRODUCTION CONT.

- ☐ Review important systems and accounts such as GatorConnect, Docutraq, Event Management System (EMS), Social Media Accounts.
- ☐ Review financial standing of the organization and transfer any account details to the incoming officers as needed.

Officer transitions should not begin and end with this single meeting though. You might find it best to include a period of Officer shadowing during your transition period—this can be a time for the incoming and outgoing officers to learn together how to communicate with one another and a real time showcase of the roles and responsibilities the incoming officer will face. Another great example of a transition exercise is to co-lead meetings between incoming and outgoing officers—this gives the outgoing officer a change to role model meeting or project behavior and the incoming officer the chance to begin developing relationships with the incoming Leadership Team. Or hosting individual transition meetings with the outgoing and incoming officers as well as a larger team meeting with all outgoing and incoming officers.

Though these are just a few examples of officer transition exercises, you should always consider what works best for your student organization to be successful!

TRANSITION MEETINGS



TRANSITION MEETING SAMPLE AGENDA

I. WELCOME AND INTRODUCTIONS

Help participants get acquainted | explain purpose of the meeting.

II. THE YEAR IN REVIEW

A. Goals: Review the group's goals for the previous year.

- What did we hope to accomplish?
- How well did we do on each goal?
- What goals should be continued this year?
- What goals need to be changed?
- What goals are no longer feasible?

B. Programs and Activities: Evaluate what your group did.

- How effective were the programs / activities we hosted?
- How did we measure their effectiveness?
- Did we have a good balance in our schedule of programs and activities?
- Were our programs and activities consistent with our goals?
- What activities and programs do we want to repeat?

C. Membership: Evaluate number of members and their commitment.

- What actions did we take to recruit members?
- Were our recruitment efforts successful?
- Are our members as actively involved as we want them to be?
- What were the opportunities for members to get involved in a meaningful way?

D. Officers and Organizational Structure: Evaluate officers and structure.

- Are officer roles and responsibilities clearly described? How?
- Did officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
- Is the time and effort required in each position comparable?
- Is there two-way communication between officers and members?

E. Evaluate Organizational Operations.

- Were the finances adequate for our group and managed properly?

TRANSITION MEETINGS



TRANSITION MEETING SAMPLE AGENDA

- Were meetings run effectively? Was their frequency adequate?
- Did we have scheduling conflicts with other groups or activities?

F. Advisor Involvement: Evaluate both quality and quantity.

- Did our advisor provide the support we needed?
- Did we give our advisors and other faculty a chance to get involved?
- How could we improve faculty and advisor involvement?

G. Public Image: Evaluate how other groups perceive you.

- How do we see ourselves? Is this how “outsiders” see us?
- How can we enhance our image?

III. YOUR LEGACY TO THE NEW OFFICER TEAM

- A. What are the current strengths and weaknesses of the group?
- B. What is the best advice you can give your successor/s?
- C. What were the challenges and accomplishments in your term?

IV. Officer Transition

Have the new and outgoing officers meet individually to discuss.

- A. Responsibilities of the position, with a job description.
- B. A timetable for completion of annual duties.
- C. Unfinished projects.
- D. Important contacts and resource persons.
- E. Mistakes that could have been avoided.
- F. Advice for the new officer.
- G. Any questions the new officer may have.
- H. Where the outgoing officer can be reached with questions.

V. Wrap-Up

- A. Celebrate outgoing and incoming board and wish everyone luck!
- B. Provide an opportunity for informal socializing.

WORKING **WITH YOUR ADVISOR**



THE ROLE OF AN ADVISOR

Registered student organizations must all have an organization advisor that is a full-time, salaried employee of the University of Florida. Organization advisors serve as a support system for student organizations and play an integral role in their success by serving as an educator, coach, supporter, and mentor to the organization's executive board and membership. Each student organization has its own identity, is unique, and contributes to the university community in a variety of ways, and therefore as individualized expectations for the advisor of the organization. During a time of officer transition, it is helpful to reflect on the role of the advisor for your organization to best assist during a transition as well as throughout the course of the year.

Work on the morale of your group members. Unless they feel good about their roles, your group members will not be as cooperative and productive as they could be.

Problem Solving Agent: Your advisor may be the impartial third party that helps you work through problems and conflict.

Information Resource Person: Hopefully, your advisor has been around long enough to know some of the ins and outs of getting things done. Use their experience and expertise!

Idea Resource Person: Use your advisor to help discover new ideas when your creative juices dry up.

Sounding Board: If you want to try out a new idea on an impartial party before proposing it to the entire group, try it out on your advisor.

Administration Liaison: Rely on your advisor for advice on who in the administration can help you with your projects.

Organization's Representative: Hopefully, your advisor will

WORKING **WITH YOUR ADVISOR**



THE ROLE OF AN ADVISOR CONT.

represent your concerns to the administrative “powers that be.”

Interpreter of University Policies and Procedures: Rely on your advisor’s expertise.

Analyzer of the Group Process: Use your advisor as an observer if things in your organization seem to be stuck.

Role Model: A positive one, of course!

Attendee / Participant at Events: Be sure to keep your advisor informed so that they can make an appearance to show support.

Conflict Resolution Assistant: Use your advisor as an impartial mediator.

Financial Supervisor: Use your advisor’s experience with University procedures to help you stay on top of your organization’s finances.

Meeting Attender: Be sure to inform your advisor of all meetings so that they can attend.

Assistant in Evaluating the Organization: Use your advisor as a resource to determine what you should be evaluating and when.

Empowerer of Students: Your advisor should be a valuable resource who helps your organization reach good decisions.

WORKING **WITH YOUR ADVISOR**



UNIQUE TO YOUR ORGANIZATION

The role of the advisor in each organization looks different for each group, and within each group looks different each year. Take some time to reflect on the role of your advisor for your organization either as an outgoing officer, and/or an incoming officer for your organization.

Ideally, what do you wish the role of an advisor would look like for your organization.

What does the advisor do to support the mission of the organization?

What are some specific tasks that allow your advisor to accomplish this?

How much time/effort should your advisor be putting on these tasks to support your organization?

What does the interaction expectation of your advisor and officers/members look like?

WORKING **WITH YOUR ADVISOR**



UNIQUE TO YOUR ORGANIZATION

Based on the prior questions you responded to; reflect on what your advisor **currently** does in their role.

What does the advisor do to support the mission of the organization?

What are some specific tasks that allow your advisor to accomplish this?

How much time/effort should your advisor be putting on these tasks to support your organization?

What does the interaction expectation of your advisor and officers/members look like?

Take note of any discrepancies between what your ideal and current advisor roles looks like and schedule some time to discuss these differences with your advisor so they can best support your organization!

WORKING WITH YOUR ADVISOR



ADVISOR/ ADVISEE EVALUATION

With all great work comes the opportunity to reflect and think critically about ways to improve. Assessment and feedback are essential to understanding what worked well, and what areas could be improved upon.

ADVISOR SELF EVALUATION CHECKLIST

Answer the following questions as they relate to your role as an advisor.

ITEM	Y	N
I actively provide encouragement to members		
I know the goals of the organization		
I know the group members		
I attend regularly scheduled executive board meetings		
I attend regularly scheduled organization general meetings		
I assist with the orientation of new members and participate as needed		
I attend the organization's special events		
I assist with orientation and training new officers		
I help provide continuity for the organization		
I confront the negative behavior of members		
I understand the principles that lead to orderly meetings		
I have read the groups constitution		
I am knowledgeable about the organization's history		
I recommend and encourage without imposing my ideas and preferences		
I review the organizations financial records with the Treasurer		
I understand the principles of good fundraising		
I understand how issues of diversity affect this organization		
I attend conferences on and off campus with the organization's students		
I know the steps to follow in developing a program or event		
I can identify what members learn by participating in the organization		

WORKING WITH YOUR ADVISOR



ADVISOR/ ADVISEE EVALUATION CONT.

ADVISEE EVALUATION OF ADVISOR

Answer the following questions as they relate to your organization advisor.

ITEM	Y	N
Our advisor actively provides encouragement to our members		
Our advisor knows the goals of the organization		
Our advisor knows the group members		
Our advisor attends regularly scheduled executive board meetings		
Our advisor attends regularly scheduled organization general meetings		
Our advisor assists with the orientation of new members and participate as needed		
Our advisor attends the organization's special events		
Our advisor assists with orientation and training new officers		
Our advisor helps provide continuity for the organization		
Our advisor confronts the negative behavior of members		
Our advisor has read the groups constitution		
Our advisor is knowledgeable about the organization's history		
Our advisor recommends and encourages without imposing their ideas and preferences		
Our advisor reviews the org's financial records with the Treasurer		
Our advisor understands the principles of good fundraising		
Our advisor understands how issues of diversity affect this organization		
Our advisor attends conferences on and off campus with the organization's students		
Our advisor knows the steps to follow in developing a program or event		
Our advisor can identify what members learn by participating in the organization		
Our advisor work with the organizations members in conducting assessments and evaluations		

OFFICER TRANSITION CHECKLIST

The success of a student organization is contingent on its ability to maintain and pass on information from one year to the next, and this can be achieved through officer transitions. It helps ensure continued operation, minimizes confusion, offers outgoing officers a sense of closure, and provides incoming officers a foundation of knowledge. Here is a checklist to assist your organization in facilitating positive officer transitions.

STAKEHOLDERS:

- ☐ Outgoing Officers
- ☐ Incoming Officers
- ☐ Student Org. Advisor
- ☐ Members
- ☐ Campus & Community Partners

MATERIALS:

- ☐ Constitution
- ☐ Budget Reports
- ☐ Event Planning Documents
- ☐ Usernames and Passwords to Organization Accounts
- ☐ Contact Lists

ORGANIZATION HISTORY:

- ☐ Constitution and Bylaws
- ☐ Goals and Objectives
- ☐ Calendar of Events & Programs
- ☐ Officer Role Descriptions
- ☐ Relationship Dynamics
- ☐ Status Reports of Projects

TO DO:

- ☐ Update Officer Information on GatorConnect
- ☐ Host Transition Meeting/s
- ☐ Re-register the Org. Annually
- ☐ Add Incoming President and Treasurer to Bank Accounts
- ☐ Update Space Allocation

ORGANIZATION HISTORY:

- ☐ University Policies & Regulations
- ☐ Officer Training Module
- ☐ Campus Resources
- ☐ Strengths of Organization

OTHER:

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

IMPORTANT

CONTACTS



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PHONE: 352-392-1261

GATORWELL HEALTH PROMOTION SERVICES

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