

## RSO OFFICER TRANSITION CHECKLIST

### RECOGNITION (APRIL - SEPTEMBER)

**Note that elections should occur prior to completing the Registration form for Re-Recognition in mid-April.**

- Officers (returning and/or new) will need to complete the [annual Re-Recognition](#) process, which entails [filling out a re-registration form](#), communicating about the anti-hazing agreement/waiver, and completing required training modules and/or sessions. The process opens in mid-April and is due for completion by the first day of classes in September.

**We strongly encourage officers to complete the Registration form before leaving campus in the spring!**

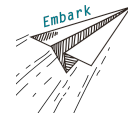
- ***Make sure information is getting to the right people!*** Emails will be sent to students listed as officers in Embarq.
- ***Continue to access Embarq features!*** Embarq will close to groups when Re-Recognition begins until officers complete their form. Complete the form early so that your Authorized Signers can process transitions, and your Officers can send emails, etc.



Re-Recognition Information



Officer Toolkit + Re-Recognition Form  
Instructions



## OFFICER TRANSITION & ORG END-OF-YEAR TASKS

### **Officer Transition**

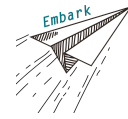
- Conduct your group's election (here are [instructions](#) for using Embarc)
- Hold necessary meetings, training or shadowing between outgoing and incoming officers
- Have new Officers make connections with key people/staff (ex. Introducing new officers by email to your advisor/coach and other key contacts for your org)
- Create/Update officer roles and responsibilities description if needed (should be included in your constitution)
- Create and/or pass over any internal training materials.
- Finish all necessary correspondence (letters, emails, phone calls, etc)
- Transfer ownership/management of all email lists, google drives, etc.

### **Documents:** Upload your files to your Embarc group

- [Instructions](#) for file management in Embarc
- Group's History/Records (if applicable - also consider sending to Archives)
- Login Information (Google Drive, Calendar, Passwords, etc)
- Constitution
- Meeting Agendas and Minutes
- List of Annual Procedures
- Important contact information and correspondence (contact information for officers, advisors, coaches, departments, staff members, organization partners, vendors, etc.)
- Current reservations or contract documentation (i.e. sponsorship agreements)

### **Financial:** An understanding of the kind of funding the group applies for (annual, semesterly, or monthly), how to create a Budget Request on Embarc, and a sense of what you might need funding for (annual events, dues, coaches, etc).

- Have your incoming and outgoing Treasurers review your org's Accounting Book in Embarc together
- Have your outgoing Treasurer introduce your incoming Treasurer to the SGA Business Office
- Attend mandatory audits



## Student Org Transition Checklist

- Surveys / Forms / Elections:** Make sure any forms or surveys on Google Forms, Survey Monkey, etc. are moved to your Embark group.
  - [Instructions](#) for creating surveys, forms & elections
- Item Storage:** Details about group storage and supplies (do you have things stored in Blanchard, Cultural Houses, or other? What do you have stored? Are you adhering to [storage policies](#)?)
  - Attend semesterly clean-out days in storage spaces
  - If you have storage in Blanchard 108 make sure your items are labeled with your group name.
  - Make sure that you have no [prohibited items](#) stored (including food!)
- Constitution:** Update your group's constitution by Student Involvement's fall deadline.
- Email Listservs:** Update group email lists & subscribe New Officers to Important Listservs, if applicable (i.e. Cultural Centers emails, etc)
- Access/Keys:** Return any borrowed keys to important spaces or storage rooms/containers - [email student-involvement@mtholyoke.edu](mailto:student-involvement@mtholyoke.edu)

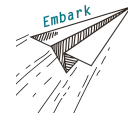
## UPDATING OFFICERS & MEMBERS IN EMBARK

**Officers will be updated when the Re-Recognition form is completed, but here are instructions for adding officers throughout the year:**

- How to add new Officers:
  - Log Into [Embark](#) and navigate to your group
  - Go to Dashboard -> Officers and click the brown "Add Officer" button (top right)
    - Here you can also assign your Officers position titles.
    - You can also modify your Officers' permissions by clicking the 'Permissions' button (top right corner)..

*Contact [embark-help@mtholyoke.edu](mailto:embark-help@mtholyoke.edu) to add a new Officer(s) to a Group if no one in the Group can add new Officers.*

- How to add new Members:
  - Log Into Embark and navigate to your group



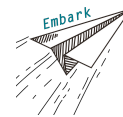
## Student Org Transition Checklist

- Click “Members” on the left column, and click the blue “Add Member’ Button (top right corner).
- Type the email or name Info for the new Member(s) you want to add and click their names when they pop up. Click the blue ‘Add’ button.
- Have new Officer(s) attend a general and/or feature-specific Embarc training session. These are the training sessions we currently offer:
  - General Training
  - Sending Emails
  - Forms & Event Features
  - Membership Management
  - Website Creation
  - \*Other topics by request, email [embark-help@mtholyoke.edu](mailto:embark-help@mtholyoke.edu)

## NEED ASSISTANCE?

- Contact [student-involvement@mtholyoke.edu](mailto:student-involvement@mtholyoke.edu) with any questions.
- Contact [embark-help@mtholyoke.edu](mailto:embark-help@mtholyoke.edu) if you need assistance with the platform.
- Contact or set up a meeting with one of the [Student Involvement Consultants](#) at [involvement-consultants@mtholyoke.edu](mailto:involvement-consultants@mtholyoke.edu) for additional support.

		
<a href="#">OSI Helpful Links</a>	<a href="#">Student Involvement Consultants</a>	<a href="#">Embarc resources and training</a>



## NEED MORE HELP?

	
<p><a href="#">Re-Recognition Information</a></p>	<p><a href="#">Officer Toolkit + Re-Recognition Form Instructions</a></p>
	
<p><a href="#">MHC Student Group general information</a></p>	<p><a href="#">CampusGroups (parent company) resource articles</a></p>