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*Adapted from Sam Houston State University Department of Student Activities  
**This document was originally created by the Carolina Center for Public Service. Visit [http://ccps.unc.edu/](http://ccps.unc.edu/).  
***Adapted from “Transition Checklist” and “Successful Transitions,” created by Carolina Center for Public Service at UNC-Chapel Hill, 2006.  
****Adapted from “Leadership Transition Checklist” created by Student Life Campus Involvement at University of Michigan, 2018.
Student Organization Officer(s) Transitioning 101***

Tips for Successful Transitions:
● Have a transition planning meeting
● Introduce new officers to key contacts
   ● Advisors, community partners, UNC administrators
● Technology orientation
   ● Update new positions/names in Heel Life
   ● Provide information regarding your org’s usage of their webpage
● Create a Transition Notebook
● Fulfill outstanding obligations (especially financial)

Transitioning Methods:
● Documentation/record-keeping of all important information
● Shadowing
● Meetings / social events / retreats
   ● Relaying information face-to-face
   ● It’s important to acknowledge and celebrate the past of the organization and energize for the future
● Reflection
   ● On past events, future goals, critical questions

Successful Transitions:
● Preserve important information and relationships
● Build and learn from past successes and mistakes
● Allow for continuity and stability of the organization
● Keep members excited about the organization
● Follow a plan and use a to-do list!

*** Adapted from “Transition Checklist” and “Successful Transitions,” created by Carolina Center for Public Service at UNC-Chapel Hill, 2006.
Outgoing Officer Reflection Questions*

The incoming officer(s) should ask the outgoing officer(s) each of the following questions. Feel free to use the space provided to record their responses or notable points. These questions are designed to help the incoming officer think critically about the impact of the role they are entering.

- What aspect of the position did you like best? Least?

- What was the most challenging part of the role and could you give a specific example of this/how did you go about resolving this challenge?

- What is one thing you wish you had done, or done better? How could you have done better?

- What skills have you developed or built on during your term as officer that you feel will be especially useful in the future?

- What are some things you wish you had known before taking over the position?

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Incoming Officer Value Sheet

The outgoing officer(s) should ask the incoming officer(s) each of the following questions. Please use the space provided to record their responses. This activity is designed to help the incoming officer reflect on their values in relation to their position.

**What are your top 5 personal values?** (Ex. Honesty, punctuality, faith, determination, creativity, etc.) **How do you envision your values being expressed within your role?**

**What do you think will be the greatest challenge for you in this role?** Why? (Ex. The move to virtual programming)

**What do you think will be your greatest strength in this position?** Why?

**What impact do you want to have on your organization through this role?**
**Value Action Plan** (for incoming officers)

The incoming and outgoing officer should work together to fill out this sheet. It is designed to turn the incoming officer’s expressed values and goals into workable action items that they can reference throughout their term of office.

**Pick one aspect or trait of the legacy you want to leave. Write it below!** (Ex. “organization”, or “transparency”)

List three tangible things (action items) you can do to accomplish this goal in your position:

1. 
2. 
3. 

What resources will you need to accomplish the above actions? Name at least 3, and be specific! (This can be anything from specific information to physical resources.)

1. 
2. 
3. 

How can you keep yourself accountable for accomplishing these actions? List 2 ways.
Role Description Questions*  
The outgoing officer(s) should answer each of the following questions. Please have the outgoing officer(s) share their responses with the incoming officer(s) in the space provided. These questions are designed to help the incoming officer think critically about the functional aspect of the role they are entering.

Give a general description of your role.

If you had to boil down your position to 5 functions, what would they be? (Ex, “taking attendance”, or “managing fines”)

1.
2.
3.
4.
5.

What function of your role was most difficult and why? Did you/how did you accomplish it anyway?

What is the technical knowledge/skills did you need to possess to do this job well?

What other officers or groups can I expect to work closely with, and to what degree?

What should be done before the semester ends, during the break, and at the beginning of the new semester?

**Adapted from Sam Houston State University Department of Student Activities**
Key Contacts**

List key contacts of the organization on campus and in the community.

**CAMPUS CONTACTS**

In the notes section, include extra information about the past relationship with this person/organization, and what the person can specifically help with, etc.

*Staff/Faculty Advisor Name:*

Phone:

Email:

Notes:

*Campus Contact:*

Name:

Position/Organization:

Phone:

Email:

Notes:

*Campus Contact:*

Name:

Position/Organization:

Phone:

Email:

Notes:

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COMMUNITY CONTACTS

Be sure to notify the community partner of the change in leadership. If possible, have the outgoing leader accompany the incoming leader to a meeting with the community partner. In this meeting, review the agreement between and the expectations of the student organization and the community partner.

**Community Partner/Agency:**

Contact Name:
Email:
Phone:
Notes:

**Community Partner/Agency:**

Contact Name:
Email:
Phone:
Notes:

**Community Partner/Agency:**

Contact Name:
Email:
Phone:
Notes:

**Community Partner/Agency:**

Contact Name:
Email:
Phone:
Notes:

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Finances**

CUSO ACCOUNT INFORMATION

Since the phasing out of SAFO accounts, Registered Student Organizations have two options for financial accounts. The first option is an off-campus bank account, and the other is a CUSO account. CUSO stands for Carolina Union Student Organization Account. These can be useful if your RSO receives funding from a student governing body, student fees, a university department, or university development funds.

To use funds in a CUSO account, each transaction requires the completion of a CUSO form which can be found on the Student Organizations Finances page on Heel Life. There are six parts of the form: purchase type and payment, funding source, purchase details, event details, extra notes, and authorization. There are several categories of purchase type, and each require different additional documentation.

More information regarding the CUSO forms and accounts can be found on the ‘Student Organizations Finances’ Heel Life page.

Organizations may have multiple IDs as part of the financial process.

- **CUSO ID#** - This number begins with a 4 and is used to identify student government funding. If you have received funding from Undergraduate Student Government or Graduate & Professional Student Federation, you will use this number for expenditures. As organizations receive funding from various student governing bodies, new IDs will be created on your behalf. There is no need to request one in advance.

- **ORG ID#** - This number begins with a 3 and is used to spend funds from a student organization’s Student Enrichment Account. Funds that carried over into this account would have been from your organization’s 13-account in SAFO. The use of these funds is restricted by the University, so please review the training and contact CUSO@unc.edu for any clarification or help needed.

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OFF-CAMPUS BANK ACCOUNT TIPS AND RECOMMENDATIONS

Your organization is responsible for its own finances and financial records, and all financial responsibility rests with the leadership of the student organization. The following banking tips and recommendations will help your organization keep accurate records and avoid financial issues:

- In order to maintain good financial control, more than one person should hold responsibility for financial transactions. It is recommended that the student organization require two signatures on any checks written on behalf of the group. It is encouraged that the organization’s advisor always has access to the checking account for easier transition.

- Keep authorized signer contact information current with your bank. Do not simply hand over debit cards and checkbooks to new officers without informing the bank that a new person will oversee organization funds.

- All official banking documents should be scanned and stored electronically using the appropriate permission settings in the documents folder of your organization’s page on Heel Life.

- All registered student organizations may apply for a mailbox in the Union to ensure that the group will have a consistent address to which bank statements can be mailed. RSOs interested in applying for a mailbox can contact the Office of Student Life & Leadership to secure a mailbox. It is imperative that officers check this mailbox regularly.

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REVENUE (Sources of Funding) EXPENSES (How Funding was Spent)

Student Congress Funds $_________ Food $_________ Fundraising Events $_________
Meeting Expenses $_________ Membership Fees $_________ Supplies $_________ Grant Funds $_________
Printing $_________

Other Funds
Copying $_________ $_________ Other Program Expenses: $_________

$_________ $_________ $_________ $_________ $_________

Total Revenue $_________ Total Expenses $_________

Surplus or Deficit = $_________ (Revenue – Expenses)

ACCOUNT INFORMATION (account numbers, balance, etc.):

EIN Number:

FUNDING SECURED FOR NEXT ACADEMIC YEAR *If funding source is a grant, attach a copy of the grant proposal and the grant agreement!

Committed funding of $_________ Funding to be used for:

________________________________________________________________________ Source of funding
(organization):____________________________________________________________

Committed funding of $_________ Funding to be used for:

________________________________________________________________________ Source of funding
(organization):____________________________________________________________

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Login Information Sheet

<table>
<thead>
<tr>
<th>Account Name:</th>
<th>Username:</th>
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Outgoing Officer To-Do List*

☐ Update Heel Life with information of new officers and their positions

☐ Gather and organize all documents and files

☐ Finish all necessary correspondence (letters, e-mail, phone calls)

☐ Prepare year-end report and evaluation (Annual Report)

☐ Review your constitution, bylaws, written material, and other documents needing revision.

☐ Develop action plan and timeline for new officer transition, including but not limited to:
  ❑ Necessary meetings attended and conducted by officer
  ❑ Sharing tasks and duties with other officers and/or members
  ❑ Introductions to key individuals
  ❑ Required meetings and trainings workshops
  ❑ Financial Information and Off-Campus Bank Account Access

☐ Annual Registration Process
  ❑ Fall Registration Period (August 15th – September 30th) or Spring Registration Period (December 1st – January 31st)
  ❑ Have two officers (president and treasurer) complete the Online Officer Orientation during appropriate registration period
  ❑ Complete online registration form located in Heel Life, select ‘Organizations’, select ‘Register an Organization’ on the left, search the organizations name and select ‘Re-register’ button next to the org
  ❑ Instruct the advisor for the organization to complete the online Advisor Agreement Form

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Incoming Officer To-Do List*

☐ Obtain a copy of the constitution, by-laws, chapter policies, and procedures

☐ Obtain a role-specific description in writing

☐ Know the goals and objectives of the previous officer

☐ Prepare your goals and objectives for the upcoming term of office

☐ Obtain a status report of all ongoing projects you will be taking over

☐ Obtain the financial records/budgets relating to your position

☐ Organize all your necessary materials both digitally and physically

☐ Obtain the accounts, listservs, usernames and passwords you will need for the term

  ☑ And know how to operate the accounts!

☐ Obtain any form, presentation, or letter templates you may need

☐ Develop major action items and a timeline for completing them

*Adapted from “Leadership Transition Checklist” created by Student Life Campus Involvement at University of Michigan, 2018.
Frequently Asked Questions

Heel Life

Q: How can my organization utilize Heel Life?

A: Heel Life houses all active student organization’s pages. On your organization’s page you can update the about section, contact information, any additional information, events, the roster, documents, and newsletters. Using Heel Life to create events and newsletters is a great way to get your organization’s name out there as these both show up on the homepage of Heel Life.

Q: How do I update my organization’s roster on Heel Life?

A: It is important to keep your Heel Life Roster updated because this is how your Heel Life Coordinator finds who to contact when they need to communicate with your organization. The primary contact should be updated when your organization transitions officers.

Additionally, an updated roster makes it easier to contact current members of your organization. Instructions on updating your roster can be found here.

Q: Is there a way to connect an organization’s roster on Heel Life to a listserv?

A: No, you cannot connect a Heel Life roster to a listserv. Heel Life is owned by a third-party vendor, so there is also no way to change this. However, officers can take advantage of the relay messaging function offered through their Heel Life page. The relay messaging function can be found on the roster section under ‘manage.’

Q: How do I find my Heel Life Coordinator and what is the best way to contact them?

A: Your Heel Life Coordinator can be found under the ‘About’ section of the ‘Manage’ view of your organizations Heel Life page. Scroll down to the bottom and their name is listed under the ‘Additional Information’ section. Heel Life Coordinators can be reached through the studentlife@unc.edu inbox. Each coordinator hosts office hours and can also schedule Zoom consultations. Please do not reach out to your Heel Life Coordinator via their personal UNC email.

Q: What is the best way to contact all the members of my organization?

A: The best way to contact the members of your organization is through the roster function. Because you add members to your roster with their UNC emails, Heel Life can contact all your
current members at once using their school emails (another important reason to keep your roster updated). Find out more information here.

**Q: Why is my organization not showing up on Heel Life?**

A: Your organization’s Heel Life page may not be showing up because it is lapsed. A lapse in your organization’s Heel Life page usually results from a lack of re-registering or failure to provide a compliant constitution. You can re-register your organization and un-lapse your organization’s page during the next registration period (starting on December 1st or August 15th).

**Annual Organization Requirements**

**Q: What is required for annual re-registration?**

A: There are three requirements that must be met for registration: the primary contact must fill out the registration form, two officers must complete the Officer Orientation, and the student organization advisor must complete the Advisor Agreement Form. If all these requirements are met, then your organization will successfully be re-registered with the University.

**Q: How do I know if my organization registers during the Fall or Spring?**

A: It is dependent upon when the organization transitions officers. Organizations that transition leadership during the spring or summer will complete their registration during the fall application period; registration opens on August 15th and closes on September 15th. Organizations that transition leadership during the fall semester will complete their registration during the spring application period; registration opens on December 1st and closes on January 31st.

**Q: What are the benefits of being registered with the University?**

A: Registration with the University includes:

- Use of specified University facilities, property, services, or equipment through appropriate reservation, typically through Event Services
- Access to funding from Undergraduate Senate Appropriations and/or the Graduate and Professional Student Senate Appropriations.
- Assistance from Student Affairs, such as the Carolina Union, Accessibility Resources & Service, Office of Fraternity and Sorority Life, Communications and Creative Services, and Event Services.
- Access to leadership training and educational workshops, general organizational advisement, assistance in publicity and marketing, program planning advisement, reference materials, and more.

**Q: Who is eligible to be my organization’s advisor?**

A: The advisor must be a full-time faculty member or staff member of UNC-Chapel Hill, UNC Hospitals, or an affiliated department; an emeritus UNC-Chapel Hill faculty or staff member; a UNC-CH retiree with affiliate status; or a campus minister.

**Q: What does it mean if my organization becomes lapsed?**

A: A lapse in registration status with the University occurs when an organization fails to meet all requirements for re-registration, or when an organization fails to provide a compliant constitution during their review period. If your organization becomes lapsed, your organization will not be able to access University resources; however, your organization can still meet if you’d like. Your organization will have the opportunity to re-register during the next registration period, you do not have to wait a full calendar year to un-lapse your organization.

**Q: What is constitution review and why is my organization being reviewed?**

A: The Student Organization Constitutional Review process in conducted to ensure organization’s governing documents are in compliance with the University of North Carolina Student Affairs standards, including but not limited to non-discrimination, accessibility, and anti-hazing policies. Each organization is placed on a 5-year rotation of review. There are six required statements that must be included in your organization’s constitution; the Constitution Guidelines document can be found on Student Life & Leadership’s Heel Life page under the ‘documents’ section. Failure to submit an updated constitution of identified non-compliance will result in a loss of registration status with the University; your organization will become lapsed.
Finances

Q: How do I know if my organization has a CUSO account?

A: Approved officers can log onto the student organization’s page and look under the “about” tab to see if the organization has an account. Only officers of the organization can view this information.

Q: How do I get funding for my organization?

A: See below:

- Undergraduate Senate Appropriations
- Campus Y YFund, specifically for social justice initiatives
- Student Organizations Council
- RHA External Grants Programming Request
- CUAB Programming Collaboration

If your organization misses the opportunity to receive funding from the University, we recommend fundraising or collecting dues.

Q: What are officers required to do with off-campus bank accounts during the transition period?

A: Exiting officers and incoming officers must go to the bank branch and transfer the account to the new officers of the organization. All exiting officers must be removed from the bank account.

RSO Services

Q: How do I get a mailbox for my organization?

A: Please submit a Registered Student Org (RSO) Services Request Form and indicate that you would like to request a mailbox. Your request will be viewed by a member of our team and they will communicate with you on how to move forward.

Q: How do I change my organization’s name?

A: Please submit a Registered Student Org (RSO) Services Request Form and indicate that you would like to change your organization’s name. Your request will be viewed by a member of our
team, and they will communicate with you on how to move forward. Keep in mind, use of the University’s name in the organization’s title is permitted, so long as University sponsorship or endorsement is not implied or stated. More details can be found within the RSO form or on the University Branding and Identity Guidelines website.