



## Student Organization Checklist

**M**any times the success of a student organization depends on its effective leadership transition. You know the scenario: you are handed a set of unbalanced books and unpaid bills at the end of the year and you spend five hours in Student Organization Financial Services (SOFS); or you receive a letter from Student Involvement in October telling you that your organization is on inactive status because nobody ever told you about the Annual Review Form; or you missed the Student Organization Training in the fall because you didn't know you had a mailbox on-campus. Don't let this happen in your organization – provide an effective transition.

Here are things to think about throughout the year:

### **BEGINNING OF THE ACADEMIC YEAR...**

- Have you filled out your Annual Review Form (ARF)?
- Verify your account balance with SOFS Office.
- Meet with your organization's advisor.
- View the RSO Book online at <http://si.unl.edu/involved/soar/>
- Make plans to attend a Student Organization Training.
- Review financial records, constitutions and bylaws, and other important documents.

### **AT ANY TIME DURING THE YEAR...**

- When officers are elected or officer/advisor addresses change, pick up an Annual Review Form (ARF) in 200 Nebraska Union or 300 Nebraska East Union to ensure your group has the most updated contact information.
- Train new officers in bookkeeping, budgeting, completing forms and the Event Planning & Registration process.
- Introduce all new leadership to Student Involvement staff.
- Submit nominations for Student Impact Awards sponsored by Student Involvement (spring semester only).

### **END OF THE ACADEMIC YEAR...**

- Reconcile all of your student organization financial records, pay all your bills, make sure you have money in your account for any bills over the summer, process all disbursements and transfers, etc.
- Organize your officer files and resources and pass information and supplies to new officers.
- Recognize and reward members for their accomplishments.
- **If anyone other than the treasurer will be handling financial responsibilities over the summer, add his/her name to the signature cards in the SOFS office.**

Revised 6/2008

For more information on organization and personal development skills in the SOAR series, stop by or call UNL Student Involvement, 200 Nebraska Union, 472-2454; or 300 Nebraska East Union, 472-1780. Staff members will be happy to assist you and answer your questions.

student **involvement**  
<http://involved.unl.edu>