Outgoing Officer Checklist

Below you will find a list of resources to help you as you register your organization and transition out of your leadership role. Any additional questions can be directed to studentengagement@stanford.edu

☑ Hold leadership elections

Hold elections as outlined in your constitution by week 4 of spring quarter. See our best practices for elections here.

☑ Register your organization in CardinalEngage

- When the registration period opens on Monday, April 4, 2022, officers of an organization will see the Group Re-Registration button appear on top of the group page.
- The deadline for re-registration is Sunday, June 19, 2022. After the deadline, organization management functions will be disabled for the group until an officer submits the annual registration form.
- For this year’s renewal, you will need:
  1. Org’s approved constitution, mission statement, logo
  2. President, Vice President/Co-President, and FO
  3. 2 additional members for initial set up (you will be able to add more later)
- After you submit this information, you will be automatically directed to a form with additional registration questions and an end of year reflection.
- To return to an incomplete form, go to Home > My Surveys/Forms in the left navigation menu.
- Organizations that fail to complete annual registration will be placed on dormant status.

☑ Transition Leadership Roles

Begin transitioning roles early. See our best practices for transitions here.

Checked-Off by Yourself

☐ Compile necessary documents such as ASSU requests, event plans and layouts, membership rosters, and marketing materials

☐ Meet with incoming officers to review constitution and other transition documents
**Transition Templates (Optional)**

Need helpful transition templates? Please make a copy before editing.

1. Officer Transition Meeting Template
2. Rolling Agenda Template
3. Year Long Planning Document

**Process all bills in GrantEd by X DATE**

- REMINDER: Only change to incoming FO after all bills from this academic year are processed.
- No reimbursements can be submitted for this year after **X DATE**, so do not expect reimbursements after this time. Late reimbursements will not be processed.
- All unspent ASSU Quick Grants, Standard Grants and TSF funding are taken back **as of X DATE**. ASSU Annual Grants excess funding will be transferred to your reserves account.
- For unusual situations, seek help from the ASSU/SSE.

**Checked-Off by Yourself**

- **Review account statement. Check for outstanding payments/transfers.**
  
  If you do not have sufficient funds in the correct account line, submit a line item budget modification.

- **Solicit all receipts from members. If missing, ask vendors for remaining invoices.**