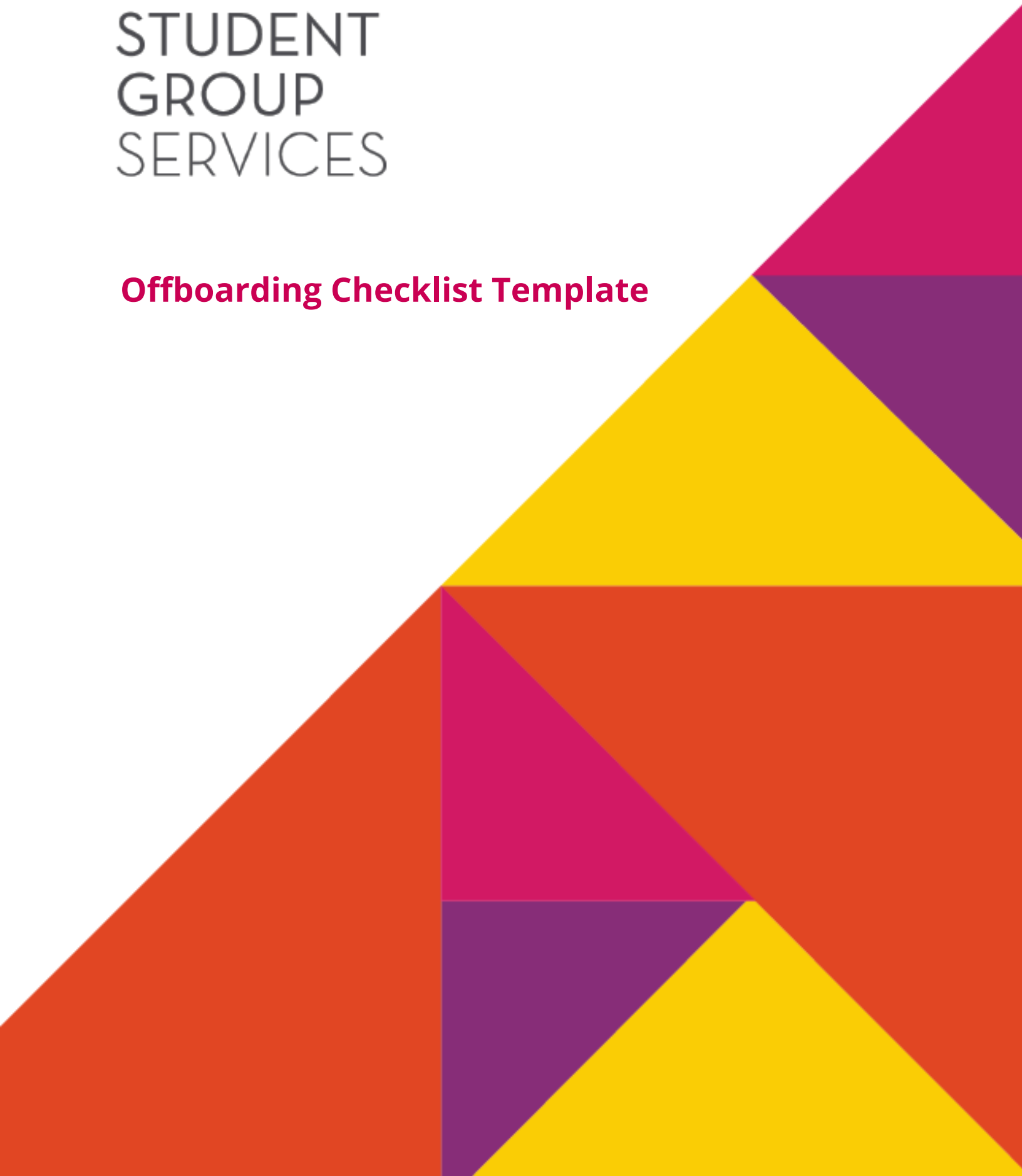


# STUDENT GROUP SERVICES

## **Offboarding Checklist Template**



<b>Student Group Name</b>	
<b>Date</b>	
<b>Executive Name</b>	

Time to shine, finish teams, and reflect on your accomplishments and challenges from the past year. All of the information you can provide to your successor can prevent them from making repetitive mistakes, and help them make the club bigger and better than before!

There are some materials that will be especially important to pass along to the new team in charge of your club, to ensure continuity and success in the future. These can be put into each individual officer transition manual (if your group had one) or, if you prefer, transferred in a general team transition resource.

<b>Transition Document</b>	<input type="checkbox"/> See "Transition Manual General Template" - this document is specific to <b>each position</b> and provides an overview of <b>duties, timelines, and important resources</b> for each role
<b>Mission Statement, Values, Goals</b>	<input type="checkbox"/> Review your group's mission statement that clarifies your group's continuity and focuses the direction of the group <input type="checkbox"/> Include both <b>short and long term goals</b> , and give new executives an <b>overview of the progress</b> that you've made in achieving them. <input type="checkbox"/> If your student group doesn't have at least a mission statement, you could incorporate the creation of one into your transition workshop or retreat.
<b>Student Group Constitution and/or Bylaws</b>	<input type="checkbox"/> Ensure that your new executive officers have copies of the constitution and bylaws to help prevent future problems with communication and procedure. Make sure it accurately reflects what your group does, and that you are following the rules everyone's agreed to.
<b>Club Policies and Procedures</b>	<input type="checkbox"/> These can be outlined in your constitution as well, but if you have separate policies on internal programming (such as granting or scholarship programs, committee assignments and compositions, etc), include these for easy reference as well!

<p><b>University of Alberta Policies and Procedures</b></p>	<p>Ensure your successors go through the below documents and are aware of the coming registration requirements</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Student Group Procedure</a></li> <li><input type="checkbox"/> <a href="#">Code of Student Behavior</a></li> <li><input type="checkbox"/> <a href="#">UASU Bylaw 5100</a></li> <li><input type="checkbox"/> Your group's Registration and Training Deadlines</li> </ul>
<p><b>Financial Information</b></p>	<p>Ensure you pass the below financial information to your successors and transfer your signing authorities.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Bank account info (home branch, account number, current signing authorities...)</li> <li><input type="checkbox"/> Annual Budget</li> </ul> <p>Optional: Tax Forms, Application, Etc (And their deadlines)</p> <ul style="list-style-type: none"> <li>• Note that most groups do not pay taxes. Make sure you check with your advisors, external affiliates, or past executives.</li> </ul>
<p><b>Previous Records, Agendas, and Meeting Minutes</b></p>	<p>Make sure all these documents are already uploaded to your group shared drive and transfer the drive ownership to your successors. Ensure all the resources are centralized and accessible to all the incoming executive members.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Any correspondence records you have to give the incoming officers a good idea of where they should start</li> <li><input type="checkbox"/> Agendas and old meeting minutes from the previous year</li> <li><input type="checkbox"/> Contracts and agreements with stakeholders such as the University of Alberta Trademarks &amp; Licensing office, sponsors, external affiliates, etc</li> <li><input type="checkbox"/> Deadlines for renewals such as student group CCIDs, website domains, etc</li> </ul>

You can organize these materials into a physical, hard-copy binder or folder, or upload them onto a shared Google Drive for easy reference anywhere. The most important part is making them accessible to everyone! If your club has any materials that are crucial to the functioning or general operations that do not appear on this list, of course include them as well! This list is the most generally applicable to our experiences with student groups so far. If you have any questions or would like any additional support, feel free to reach out to Student Group Services at clubs @su.uablerta.ca.