**CLUB TRANSITION WORKBOOK**

Welcome to the Club Transition Workbook!

The purpose of this workbook is to create an accessible document for Club Executives to transfer club information to new Club Executives. This is to ensure a smooth transition of important information.

The Club Transition Workbook is meant as a guideline. Following the instructions in this handbook is not required by neither Saitsa nor SAIT. We want this to be a guide for ensuring the most important details of your student group’s leadership are passed on.

This handbook is also not a rulebook: feel free to take our resources and make them your own or use some but not all -- whatever works best for you and your team! The resources, exercises, and lists in this book have been compiled from a variety of places and chosen based on the experiences of past student group and volunteer organization executives. If you have suggestions for additions to future editions of this handbook, please send them to the Clubs Coordinator at saitsa.clubs@edu.sait.ca

Table of Contents

[Basic Club Information 3](#_Toc86676664)

[Club Name: 3](#_Toc86676665)

[Membership 3](#_Toc86676666)

[Mission, Vision, Values and Goals 3](#_Toc86676667)

[Executive Team 4](#_Toc86676668)

[Appointing Executives 6](#_Toc86676669)

[Executive Year-End Reports 7](#_Toc86676670)

[Incoming Executive Worksheet 10](#_Toc86676671)

[Club Meeting Schedule 12](#_Toc86676672)

[General and Annual Meetings 12](#_Toc86676673)

[Executive Meeting Schedule 12](#_Toc86676674)

[Accounts and Documents 13](#_Toc86676675)

[Club Accounts 13](#_Toc86676676)

[Important Club Documents 14](#_Toc86676677)

[Club Activities and Events List 15](#_Toc86676678)

[Overview of Events 15](#_Toc86676679)

[Individual Event Reports 16](#_Toc86676680)

[Goals and Evaluation 18](#_Toc86676681)

[The Importance of a Smooth Transition 21](#_Toc86676682)

[Transition and Year End Evaluation Meeting Agenda 22](#_Toc86676683)

[Transition Checklist 24](#_Toc86676684)

[Transitioning Tips 25](#_Toc86676685)

[Contacts 26](#_Toc86676686)

[Resources 27](#_Toc86676687)

# Basic Club Information

## Club Name:

## Membership

Membership Fee:

How are members involved with the club?

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| --- |
|  |

What are your strategies to recruit members?

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| --- |
|  |

## Mission, Vision, Values and Goals

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| --- |
|  |

# Executive Team

**(20\_\_ \_\_ - 20\_\_ \_\_)**

 **PRESIDENT**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
|  |

**VICE PRESIDENT**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
|  |

**TREASURER**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
|  |

**SECRETARY**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
|  |

**Include any other executive positions** (i.e. Social Media Manager, Marketing Specialist, Creative Director, Event Planner etc.)

**Position Title:**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
|  |

**Position Title:**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
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**Position Title:**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
|  |

**Position Title:**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
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## Appointing Executives

There are a couple ways for a club to go about selecting their Executive Team. While some choose to have an election, some other clubs have chosen to recruit through the submission of a resume.

It’s important to remember that both methods work, however, both don’t work for all clubs. Pick the one that will help meet your club’s needs.

## Executive Year-End Reports

Use this report template for each executive

**Position Title:**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
|  |

Projects worked on and executives worked with:

|  |
| --- |
|  |

What did you enjoy the most? What did you enjoy the least?

|  |
| --- |
|  |

Who or what was the most helpful in getting things done? Who and what were good resources? List other aids that helped complete your role:

|  |
| --- |
|  |

Things you wish you had known before you took the role include:

|  |
| --- |
|  |

List specific accomplishments realized during your term in office and the reasons for their success. What did you try that worked well and would suggest doing again? Why?

|  |
| --- |
|  |

List any problems or disappointments you encountered as a part of your position and suggest ways of avoiding or correcting them. What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?

|  |
| --- |
|  |

What could you have done to make this a better experience?

|  |
| --- |
|  |

Create a timetable/list important dates related to your position. Provide suggestions for increasing efficiency and effectiveness.

|  |
| --- |
|  |

List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

|  |
| --- |
|  |

## Incoming Executive Worksheet

Use this report template for each executive

**Position Title:**

Name:

Email: Phone:

Responsibilities:

|  |
| --- |
|  |

I have these expectations for myself in this position

|  |
| --- |
|  |

I have these expectations for the rest of the executive team

|  |
| --- |
|  |

These are areas of opportunity or improvements I want to focus on in my role this year

|  |
| --- |
|  |

This is my vision for the upcoming year

|  |
| --- |
|  |

Things I want to Accomplish (Short-Term Goals)

|  |  |  |
| --- | --- | --- |
| Goal | Timeline | Specifics |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Things I Want to Accomplish by the End of the Year (Long-Term Goals)

|  |  |  |
| --- | --- | --- |
| Goal | Timeline | Specifics |
|  |  |  |
|  |  |  |
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|  |  |  |

# Club Meeting Schedule

## General and Annual Meetings

It is recommended that the club meets at least twice per academic year with ALL club members to maintain the feeling of being a collective.

Date:

Time:

Topics to be discussed *(example: what the members want from the club)*

|  |
| --- |
|  |

## Executive Meeting Schedule

Day(s):

Time(s):

What does a typical meeting look like?

|  |
| --- |
|  |

# Accounts and Documents

## Club Accounts

Enter any account information necessary for Executive Team access.

**Example:** Instagram – @Club\_Name – pass1234! – clubname@gmail.com

|  |  |  |  |
| --- | --- | --- | --- |
| **Account** | **Username** | **Password** | **Email Address** |
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**Examples of Club Accounts**

* Chat/Video Conferencing (Zoom, Discord, etc.)
* Cloud Storage (Google Drive, OneDrive, etc.)
* Email Address(es) (clubname@gmail.com, etc.)
* Social Media (Instagram, Facebook, etc.)
* Subscriptions and Memberships (Canva, professional associations, related groups, etc.)
* Website Manager (Wix, Squarespace, WordPress, etc.)

## Important Club Documents

*(Include document type, where it is kept, etc.)*

**Example:** club policies – Google Drive (link) – must be updated annually

|  |  |  |
| --- | --- | --- |
| **Document** | **Location of Document** | **Notes** |
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**Examples of Important Club Documents**

You can also add these documents as an appendix to this workbook

* Balance Sheet / Budget
* Club Calendar (events, deadlines, holidays)
* Club Constitution
* Club Executive Role Description and Responsibilities
* Club Room Number and Key
* Do’s and Don’ts, helpful hints and lessons learned
* List of Club Property
* List of important contacts (Alumni, Faculty, Industry Contacts, Vendors)
* Logo and Brand Guidelines, Posters and Marketing Materials
* Meeting minutes
* Policies and Procedures
* Resources, Templates, and Forms (sign up sheets, worksheets, etc.)
* Unfinished project information

#

# Club Activities and Events List

To be filled as they occur throughout the academic year.

## Overview of Events

|  |  |  |  |
| --- | --- | --- | --- |
| Activity / Event | Date | Location | Successful? (Y/N) |
|  |  |  |  |
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## Individual Event Reports

Use this report template for each event

Event title:

Location: Main contact:
Number of attendees expected: Number of actual attendees:

Event Description / Explanation:

|  |
| --- |
|  |

Event Goal: (examples: gain more membership, teambuilding, fundraising, etc.)

|  |
| --- |
|  |

Event Budget:

|  |
| --- |
|  |

Specific Objectives of Event and Measures of Success:

|  |
| --- |
|  |

Describe how the event went:

|  |
| --- |
|  |

Would you recommend holding this event again next year? Why or why not?

|  |
| --- |
|  |

What would you change about the event? What would you keep the same?

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| --- |
|  |

# Goals and Evaluation

Goals for this academic year:

|  |
| --- |
|  |

Did you achieve the goals? Why or why not?

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| --- |
|  |

What was our greatest achievement as an executive board?

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| --- |
|  |

What was our greatest challenge as an executive board?

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| --- |
|  |

Three goals we would like our successors to achieve / build on:

|  |
| --- |
|  |

What changes should be made to goals for the following year?

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| --- |
|  |

What should remain the same to the goals for the following year?

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| --- |
|  |

Additional notes:

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# The Importance of a Smooth Transition

It is important for the current Executive Team of the club to ensure that the those who take on their role the following year can do so seamlessly. Allowing for a smooth transition will ensure the club’s longevity and enhance the club’s ability to thrive and succeed in their mission, whether it be to make a difference or have fun!

The club looking to transition should begin recruiting, interviewing, and training members to succeed in their position at least 2 months before they are to leave the position. This will allow for the successor(s) to receive adequate training for them to continue running the club effectively post-transition.

*Example of what a transition may look like:*

1. Recognize positions that need transitioning
2. Recruit new Executive Members
3. Provide necessary training and documents
4. Introduce new Executive Members to Club

**REMEMBER**:
Communication is key between the Executive Team and those who will be taking over

Position(s) to transition:

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| --- |
|  |

Who is responsible for ensuring the club transition is done efficiently?

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| --- |
|  |

# Transition and Year End Evaluation Meeting Agenda

Before the newly elected executives of your organization officially assume their responsibilities, it is wise for the old and new executives to get together for a transition meeting. Such a transition meeting provides continuity and continued growth for the organization while allowing the new executives to learn from the experiences of the outgoing executives. A casual, open atmosphere should be encouraged so the organization can benefit from an honest evaluation of the accomplishments and issues of the previous year. The following outline can help make the transition meeting flow as smoothly as possible.

I. **Welcome and Introductions**

(Help participants get acquainted and explain the purpose of the meeting)

II. **The Year in Review**

1. **Goals**: Review the group’s goals for the previous year.
	1. What did we hope to accomplish?
	2. How well did we do on each goal?
	3. What goals should be continued this year?
	4. What goals need to be changed?
	5. What goals are no longer feasible?
2. **Programs and Activities**: Evaluate what your group did.
	1. How effective were the programs / activities we sponsored? How did we measure their effectiveness?
	2. Did we have a good balance in our schedule of programs and activities?
	3. Were our programs and activities consistent with our goals?
	4. What activities and programs do we want to repeat?
3. **Membership**: Evaluate number of members and their commitment.
	1. Do we have too many, too few, or just the right amount of members?
	2. What actions did we take to recruit members?
	3. Were our recruitment efforts successful?
	4. Are our members as actively involved as we want them to be?
	5. What were the opportunities for members to get involved in a meaningful way?
4. **Executives and Organizational Structure**: Evaluate executives and structure.
	1. Are executive roles and responsibilities clearly described? How?
	2. Did executives work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
	3. Is the time and effort required in each position comparable?
	4. Is there two-way communication between executives and members?
	5. How do the members feel about the executives?
5. **Organizational Operations**: Evaluate finances, communication, etc.
	1. Were the finances adequate for our group and managed properly?
	2. Were meetings run effectively? Was their frequency adequate?
	3. Did the committee structure work?
	4. Did we have scheduling conflicts with other groups or activities?
6. **Advisor Involvement:** Evaluate both quality and quantity.
	1. Did our advisor provide the support we needed?
	2. Did we give our advisors and other faculty a chance to get involved?
	3. How could we improve faculty and advisor involvement?
7. **Public Image**: Evaluate how other groups perceive you.
	1. How do we see ourselves? Is this how “outsiders” see us?
	2. How can we enhance our image?

III. **Your Legacy to the New Executive Team**

1. What are the current strengths and weaknesses of the group?
2. What is the best advice you can give your successor?
3. What were there major challenges and accomplishments in your term?

**IV. Executive Transition**

(Have the new and outgoing executives meet individually to discuss)

1. Responsibilities of the position, with a role description
2. A timetable for completion of annual duties
3. Unfinished projects
4. Important contacts and resource persons
5. Mistakes that could have been avoided
6. Advice for the new executive
7. Any questions the new executive may have
8. Where the outgoing executive can be reached with future questions

**V. Wrap-Up**

1. “Pass the gavel” in a semi-official ceremony in front of outgoing and incoming board and wish everyone luck!
2. Provide an opportunity for informal socializing.

*Adapted from: The Wichita State University Student Organizations’ Handbook (1992-1993)*

# Transition Checklist

* Complete Transition Workbook
* Create list of new executives with name, title, student ID, phone number, and email
* Introduce new executives to each other, the faculty advisor, other important contacts
* Organize all notes and files
* Finish all necessary correspondence (emails, letters, phone calls)
* Pay all bills, contracts, invoices, and outstanding balances
* If anything is still in process, memo to new executives to been sent noting what is incomplete and what needs to be done
* President is aware that they need to re-register the student club for the upcoming academic year in September
* Incoming executives shadowing sessions
* Transition and Year-End meeting
* Year-end reports and evaluation

# Transitioning Tips

1. Have a list of the necessary documents that need to be handed off to the new Executive Member(s)
2. Constant communication with the Executive Team and new Member(s) is key–have a meeting so everyone can get to know each other!
3. Keep an agenda for transitioning with all the necessary information needed.
4. Create a binder or Google Drive folder for individual offices, with a folder for each executive year; keep a historical record of each executive’s accomplishments and best practices for the future.
5. Schedule a joint Transition Meeting for both the outgoing and incoming teams. A meeting is a good time to establish expectations for the year, build a basic events calendar, and start your new team’s term together off on a great foot! This can also serve you as a team experience to bond and build rapport.
6. It may be helpful to break down calendars into tasks that should be done by the end of each month, especially if your club has recurring events or ongoing projects from year to year.
7. Encourage your successor to keep notes throughout the year to make writing this report easier for them to write at the end of *their* term.
8. Designate one or two executive positions to have the secondary or backup email address for social media and other online apps. Just in case someone loses the passwords to their accounts, it’s best to have a backup!
9. Consider using the SMART Goal model:
* Specific: What do you want to accomplish? Make it more detailed than “Make sure the club has money for next year.”
* Measurable: What are the metrics that you will use to determine whether you have achieved your goal? (e.g. How much money do you want the club to have for next year?)
* Attainable/Actionable: How are you going to accomplish the goal? What supplies or resources do you need?
* Relevant: How does this goal relate to the priorities of your office? The priorities or vision of the organization?
* Time-Based: What is the schedule or timeline for accomplishing this?

# Contacts

Saitsa Clubs Coordinator

Saitsa.clubs@edu.sait.ca

Faculty Advisor

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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dean of Club’s School

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Alumni Resource Person

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Contact:

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Contact:

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Contact:

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# Resources

Club Handbook

<https://saitsa.com/wp-content/uploads/2021/09/StudentClubsHandbook2021-FINALWEB-2.pdf>

Club Executives Resources

<https://saitsa.com/club-executives-resources/>

Club Poster Board Locations

<https://saitsa.com/wp-content/uploads/2021/10/Club-Poster-Board-Checklist-3.pdf>

Reimbursement Funding

<https://saitsa.com/clubs/reimbursement-funding/>

Saitsa Policies and Procedures

<https://saitsa.com/governance/policies-and-procedures/>

SAIT Policy AC.6.2 Student Clubs Policy

<https://www.sait.ca/documents/About%20SAIT/Administration/Policies%20and%20Procedures/AC.6.2%20Student%20Clubs.pdf>

SAIT Procedure AC.6.2.1 Student Clubs Procedure

<https://www.sait.ca/documents/About%20SAIT/Administration/Policies%20and%20Procedures/AC.6.2.1%20Student%20Clubs.pdf>

SAIT Policies and Procedures for Student Conduct

<https://www.sait.ca/about-sait/administration/policies-and-procedures/academic-student>

SMART Goals for Clubs

<http://studentleadership.com/smart-goal-examples/>