*This Manual is meant to be used for clubs to take and adapt to their own transition processes. We have provided the basic information that you should be passing on to new club leaders. Please feel free to use this as a starting point to create your own Transition Manual that will best enable your club leaders to thrive when they take over responsibilities for your club.

**Please contact uvmsga@uvm.edu with any questions or for additional help in creating a useful manual for your leaders.
Transition Checklist

- Elections held before April 1
- Re-registration on the LYNX done by outgoing club signers in mid-April
- Share budgets with new leaders
  - Give new club leaders access to Lynx/UVM Clubs page
- Hold a transition meeting with new and old leaders
- Share documentation from previous years with new leaders
- Sign up for First Year Picnic and Activities Fest

**Keep an eye out for the Club Signer Workshop in the fall**
“Clubsigner” Change over Information

As you are hopefully aware, each club has 2 designated clubsigners for each club. These 2 clubsigners are the members of the club that are allowed to make purchases, financial reallocations, and are required to attend mandatory meetings required by the SGA. One of these clubsigners MUST be the club treasurer. The other can be the President or Vice-President. If your club does not designate these specific roles, you need to choose 2 responsible individuals who will be keeping the club up to date and in good standing with the SGA.

All clubs are required to hold elections by April 1st. If you are transitioning at the end of May after elections and your new clubsigners will not be spending any money until the fall, you should make sure to update their names on the Re-Registration that will be due on the Lynx. SGA will send out emails about this so that we have your most up to date clubsigners over the summer. The clubsigners will be required to attend the Fall Clubsigner workshop in September before being allowed to spend money.

If your new clubsigners are taking over before the end of the spring semester and will be spending money, they should go online and complete the Clubsigner test. This same form is used if a clubsigner steps down or changes any time during the Fall semester.

To find the change form-test:

1. Go to: www.uvm.edu/clubs
2. Log in using your UVM netid and password
3. Click on Organizations
4. In the search tab, type in Finance
5. Click on the Finance page.
6. Go to forms.
7. Go to Clubsigner Test, fill out, and submit.
Resources for the answers to the test can be found at: http://www.uvm.edu/sga/?Page=club_resources.html&SM=menu_clubs.html

*Please be aware that before your new clubsigner is considered an official signer, they must take the clubsigner test. After the test is approved, the clubsigner book must then be signed at the SGA front desk.
Required Lynx/UVM Clubs registrations

There are a couple of times that clubs are required to “Re-Register” their clubs on the Lynx. This is how we are able to track if clubs have changed clubsigners or advisers and forgotten to tell us. It is also a good way to check-in with clubs.

There is a **Spring-Summer Re-Registration** that will be due towards the end of the Spring semester. You will need to let us know who your clubsigners for the upcoming year are and your Summer contact.

There is a **Fall Re-Registration**, which allows us to update your clubsigners again, just in case things have changed over the Summer. This will be due at the start of the Semester. It is common that over the Summer, a clubsigner may choose to not be the clubsigner upon return to School for various reasons.

There is a **Winter Re-Registration** that is due right before Winter break. This is when a club is required to updated their Roster by deleting club members that are no longer part of the club and to add new members to the Lynx page.
Passwords and account transitions

Many times when clubsigners leave a club due to graduation or leaving their position, key information is not passed on. You should be keeping a list of all the information that you need to access certain sites for your club and passing it on.

If you have any of these sites, make sure to write the information down or email it to your new clubsigner.

- Lynx access (see below section)
- Non-UVM affiliated website address and password
- Club email address and password
- Club listserv address and password, or have the access switched to the new clubsigner. If you need help with this, email account.services@uvm.edu
How to become the primary contact on the Lynx

You will need to change over the primary contact on you Lynx page, or they will not be able to upkeep your page.

This is an example from the Club Sports page. You should go to your page, click on Manage Organization and when you see this screen, click on the Roster button.

Click on the Pencil in the box that says “Primary Contact,” and change it to the new member. The new primary contact must already have joined the club on the Lynx, to be able to be the primary contact, so make sure they have done this first.
Budget Spreadsheets and Account Balances

It is imperative to explain the importance of the Budget spreadsheet, if your club has a budget, and pass this document on to your new clubsigner. For those clubs that have budgets, the excel document can be found on the Lynx, on the club’s homepage, under the Document tab.

For more information on the budgeting process, the clubsigner should visit www.uvm.edu/sga and review our Financial policies and budget workshop powerpoint.

You should find out, from the SGA Finance office or SGA Office coordinator, your most up-to-date club account totals and pass this information on to the new clubsigners. Let them know that they can come in to the SGA to inquire about club totals when they need to. They should also be keeping track of expenses and deposits so that they have this number as well.

If you will be spending money over the summer, please reach out to the SGA Business Manager, Blanka Caha, at blanka.caha@uvm.edu.

All clubsigners will attend/complete a financial training in the fall about SGA Financial policies.
Club Affairs Committee

Club Affairs Committee is an SGA committee that oversees all of the clubs on campus. They hold office hours in the SGA Galaxy Space on the 3rd floor of the Davis Center. They are available to help with club transitions, problems and general functions. Please reach out to the SGA Office Coordinator about how to get in contact with the Club Affairs Chair by emailing uvmsga@uvm.edu.

Check-In’s

The SGA Club Affairs Committee conducts club check-ins once per semester. They are done via a form on the Club Affairs Lynx page. An email will be sent out in the middle of the semester by the Club Affairs chair giving specifics about how and when to complete them.

- What they involve:
  - Detailed questions about the general data points of the club, this includes number of active members, total money raised so far, any updates to clubsigner information.
- Why they are done:
  - To ensure the clubs are meeting the standards set for clubs by the SGA
- Why they are significant:
  - Provide the opportunity for the Club Affairs committee to understand how active the club is and gives them a chance to reach out to clubs that may be looking for help.
  - If you miss a check in it will lead to deductions on your next budget request.

SGA Galaxy Space

The SGA Office is located on the 3rd floor of the Davis Center. This space is shared by SGA Senate, Graduate Student Senate, clubs, and SGA/club offices. Each club has a mailbox located in the back of the SGA Office. Many clubs have desks located in the office space. To request a lease for a desk space, please keep an eye out for an email from the SGA Office Coordinator about desk leases in the fall.

There is also a back storage area in the SGA Office called “The Cage.” The first part of the cage does not require a key to enter. This part contains art supplies for clubs to make posters, signs, etc. The second part of the cage is locked and will require getting the key from the SGA Front Desk. Each club has a labeled section in the cage where they are able to keep club materials.
Important resources

SGA Staff list

Business Accounting Specialist: Blanka Caha, Blanka.Caha@uvm.edu

SGA Office Coordinator: Sarah Flaherty, Sarah.Flaherty@uvm.edu

Club Sports Coordinator: Leon Lifschutz, leon.lifschutz@uvm.edu

Financial Assistant + University tickets coordinator: Constance Paun, constanta.paun@uvm.edu

For a list of the full SGA Senate, please visit our SGA Website: www.uvm.edu/sga

Web links:

SGA financial materials:
http://www.uvm.edu/sga/documents/FY17QuickReference.pdf
http://www.uvm.edu/sga/documents/FY17QuickReference.pdf

UVM Clubs Help:
https://engagesupport.campuslabs.com/hc/en-us

Recruiting strategies:
http://www.oxnardcollege.edu/assets/pdf/currentstudents/asg/101_ways_to_recruit.pdf
http://en.wikibooks.org/wiki/Effective_Student_Organization/Recruiting_and_Membership
http://www.uaf.edu/woodcenter/leadership/organizations/student-organizations-han/RECRUITMENT-RETENTION.pdf

Retention strategies:
http://www.nmu.edu/organizations/node/97

Delegation:
http://www.businessballs.com/delegationsmarttaskform.pdf