Club Leader Transition Timeline

**FEB 1-12**
Club leaders communicate election process to club members.

**FEB 13 - 28**
New club leader nomination & selection carried out by outgoing leaders.

**MAR 1 – 5**
Notify incoming/selected club leaders and confirm their acceptance.

**MAR 5 – MAY 24**
Knowledge transfer and club shadowing period.

**MAR 5**
Incoming leaders' names due to AASL via survey tool.

**MAY 24**
Incoming club leaders assume official club roles.
2 – 4 club leaders (*this includes your budget officer*).

Consider other roles too, such as a CDO representative?

Must be FT SOM students for the 2021-22 academic year.

Consider diversity from all angles.

Questions? Come and talk to us!
 Incoming Club Leaders names due: 

**FRIDAY MARCH 5**

http://cglink.me/s17787

Use above link to submit new leaders once selected.

*Once all leaders are submitted from all clubs, AASL will hold training on new leaders' calendars, and create a new Slack channel for incoming leaders.*
Club Leader Transition Timeline

- **FEB, MAR, APR**: 1-3 Club Leaders
- **APR**: 1 Budget Officer
- **MAY**: Submit 2021-2022 Budget to C&F
- **MAY**: Club Re-registration
- **MAY**: Incoming Leaders attend Club Trainings
Review the following document during and after incoming leaders have been selected. (March – April)

Available on [CampusGroups Handbook](#) and Slack channel. *Incoming leaders will have a separate Slack channel created for their action items and communications.*
**Club Transition**

**Outgoing Leaders Tasks**

- **Institutional Knowledge**
  - Work as a team to discuss next year’s plans/major events, leadership roles, and transition framework for long-term projects and Club planning
  - Capture a calendar of all Club programming for this academic year for reference and note suggested updates
  - Create or update any relevant how-to documents for Incoming Leaders
  - Update passwords and login information for websites and other platforms
  - Create inventory of Club’s materials and items in Club Room. Clean up and organize storage, donate, give away and recycle items no longer needed
  - Review, finalize, and move all Club documents to existing shared folders and ensure all Incoming Leaders have access

- **Financials**
  - Compile your 20/21 Club offline budgets, submitting to C&F by March 31
  - Save completed document for next year’s Leaders as a reference.
  - Save electronic copies of all important receipts, vendor contracts, helpful email and other financial records
  - Review Club COAs and their ending totals. Remember only your external COA balance rolls over to next year
  - Work with Incoming Leaders on budget recommendations for next year
  - Meet Incoming Leaders and show how to submit a purchase/reimbursement request, and how to submit budget requests on CG

**Completing your Re-Registration Process**

On March 29, AASL will initiate the Club Re-Registration Process. This process is mandatory for all established Clubs and Groups. The process updates your CG pages with new information, and collects information on your Club’s plans for the next academic year. AASL uses this information to advance plan for your major/recurring events, check all Clubs are following policies, and provides opportunity to connect with Club’s on any advance planning questions/issues we foresee.

To complete this Re-Registration Process, all Clubs will need to log on to CampusGroups, and complete the Re-Registration Process to be approved for 2021/22 as an established Club.

This process must be completed by April 21st. After this point, your Club page will be locked until you complete the process. This means you will not be able to submit budget requests, create events, or use any feature of your officer rights on the Club page. Members will still be able to access your page, but no new content can be created, until your officers complete the process.

See the guide for completing your re-registration process on the Club Handbook and more information: [https://groups.som.yale.edu/handbook/club-re-registration/](https://groups.som.yale.edu/handbook/club-re-registration/)

**Incoming Leaders Tasks**

- Attend mandatory Club Leader Training 1 (Apr 5) and 2 (Apr 7)
- Shadow Outgoing Leaders for all of Spring 2 (until May 24, 2021)
- Professional Clubs, or Clubs that work with CDO: attend the CDO Club Leader Training session on April 22
- If your Club wants to host a Conference or Case Competition, then you must submit an application by April 21, via AASL’s CG page
  - Your Conference/Case Competition applicants must also attend the mandatory Major Event Trainings on April 20. This training is part of your application. Check AASL’s CG Page to register for this training event
- If your Club has a CDO liaison: meet with your CDO Liaison before Friday, May 7th, 2021 to continue your Club’s relationship with the CDO
- Incoming Budget Officers should meet with Outgoing Budget Officer for all outstanding Club transactions, and to go through expense guidelines
- Club leaders should update their Club Website, both on CampusGroups, and any other website the Club maintains (Conferences, External Sites etc.)
- May 24: Incoming Leaders assume official role as Club Leader for academic year 2021/22. Before this point, Incoming Leaders should shadow Outgoing Leaders to understand all processes and procedures, as outlined in the mandatory trainings

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INCOMING CLUB LEADER TRAINING PART 1
Via Zoom | 11:45 a.m. – 12:45 p.m.
Club policies and resources; the essential toolkit for running a great club!
Mandatory for all incoming club leaders.

INCOMING CLUB LEADER TRAINING PART 2
Via Zoom | 11:45 a.m. – 12:45 p.m.
Clubs & Finance, and Business Operations procedures.
Mandatory for all incoming club leaders.

MAJOR EVENT TRAINING
Via Zoom | 11:45 a.m. – 12:45 p.m.
Introduction to conference planning, resources, policies, and procedures.
Mandatory for all conference organizers and encouraged for all club leaders planning major events.

CDO CLUB LEADER TRAINING
Via Zoom | 11:45 a.m. – 12:45 p.m.
Training & resources on employers, recruiting, and all things CDO.
Strongly recommended for all professional clubs, and clubs that have a working relationship with the CDO.
Key Club Dates & Reminders

19 MON APR
CLUB LEADER VIRTUAL WORKING LUNCH

21 WED APR
BUDGETS, RE-REGISTRATION & MAJOR EVENTS DUE

11 TUE MAY
LAST DAY TO HOST A CLUB EVENT

24 MON MAY
INCOMING LEADERS ASSUME ROLES
• **COVID-19:** The same protocols are in effect from Fall semester. Review the COVID-19 page for club leaders here: https://groups.som.yale.edu/handbook/covid-19/

• **Keep checking your central club email account.** Email us (somclubs@yale.edu) if you’re struggling to access.

• Be sure to put **all events on CampusGroups**, even if your event is virtual.

• Questions about **spring budgeting or Ad Hoc requests**? Contact C&F Chairs: somclubsandfinance@yale.edu
Corporate Grubhub Account!

• Yale Procurement and School of Management is excited to announce that Grubhub is now an approved supplier by establishing a Yale-wide corporate account. This new agreement allows Clubs with external funds only to order and have food delivered to VIRTUAL meetings across the US.

• The club's external account will be responsible for the amount spent plus a Grubhub 3% administration fee on eligible food and beverages, (C&F funding will not cover this.)

• As this is a new and only option, we will no longer reimburse individuals using personal funds to buy food. Please review the policy and procedure page on our Business Operations page for Grubhub – Yale Corporate Account.
GRUBHUB PROCESS

Club Leader creates a CG event. AASL approves.

In order to use Grubhub, registration must close 3 business days before event occurs.

Club confirms they have funds in their EXTERNAL COA.

We suggest a max $15 per person per event. Grubhub charges delivery and services fee. C&F will not cover funds for this expense option.

Submit a JIRA ticket to create a Grubhub event.

Includes the following information: Club COA, Event Name, Event Date & Time, Budget Per Person.

Provide BusOps your attendee list from CampusGroups.

List of attendees (including full name, Net ID, email address, location.)

Attendees Place Individual Order

https://www.loom.com/share/4f0c997e75944208ab10c8637f7fb0b

Attendees sign in to Grubhub account

The RSVP attendee will login using email address they used during registration.

BusOps creates a meeting portal in Grubhub for the event.

The club leader will be responsible to inform the attendee on next steps for using voucher.

After event BusOps will reconcile the invoice using your external funds.
Questions?
Next SOCs Meeting
Tue February 16 | 12 – 12:40 PM EST