SOC
FEBRUARY SESSION
SOM Clubs | Academic Affairs & Student Life
AGENDA

1. Club Leader Transition Reminder
2. Re-Registration Process
3. Transition Checklist
4. Club Sponsorship Process AY 21/22
COVID-19 Club Status

The same conditions and requirements currently exist for student org events as they did in Fall semester.

• “If it can be virtual, it should be virtual”.
• In-person events below 10 persons require approval through submitting on CG.
• In-person events that go above 10 people (or conflict with any of the other requirements listed on Yale’s webpage) require HSL approval.

Email SOMclubs@yale.edu before you create the event if you’re confused or have questions!

https://groups.som.yale.edu/handbook/covid-19/-/ - PLEASE READ FOR MORE INFORMATION!
New club leader nomination & selection carried out by outgoing leaders.

Notify incoming selected club leaders and confirm their acceptance.

Incoming leaders' names and roles due to AASL via CG survey tool.

Incoming leaders shadow outgoing. Assume club leader role on May 24.
INCOMING LEADERS NAMES ARE DUE:

FRIDAY MARCH 5 | 5:00 PM EST

http://cglink.me/s17787

Use the above link to submit new leaders once selected and confirmed.

*It’s like super important you partner with us on this. Honest.*
We want your thoughts on what makes a great Club Leader!

**What Values and Skills are required to lead a successful Club?**

- **Values** guide our behavior and conduct. They usually don't change that easily and help us in decision making. Every decision made by a person is influenced by their values.

- **Skills** refer to the talents of a person and their abilities. It can be attained through practice or any sort of training.
What values are most important to lead a successful Club?

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<tr>
<td>12</td>
<td>Taking ownership</td>
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<td>10</td>
<td>Enthusiasm</td>
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<td>initiative</td>
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<td>9</td>
<td>organization</td>
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<td>8</td>
<td>Endurance</td>
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<td>4</td>
<td>Patience</td>
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What skills ensure a successful Club Leader?

<table>
<thead>
<tr>
<th></th>
<th>Top Skills</th>
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<tr>
<td>8</td>
<td>time-management</td>
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<tr>
<td>8</td>
<td>organization</td>
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<tr>
<td>5</td>
<td>creativity</td>
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<tr>
<td>3</td>
<td>flexibility</td>
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<tr>
<td>2</td>
<td>Team-building</td>
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<td>2</td>
<td>Scheduling</td>
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Re-Registration
https://groups.som.yale.edu/handbook/club-re-registration/
club leaders, it's transition season

make sure your club is good to go!

re-registration period: march 29- april 21!

• Re-Register Your Club
• Submit Fall 2021 and major event budget requests
• apply to host a conference or case competition

For more information go to:  https://groups.som.yale.edu/handbook/club-re-registration/

• Meeting the needs of the student body • Elevating SOM's reputation as leaders in business and society • Addressing education, career, and community needs • Effectively using resources (such as budgets, CDO resources, space, etc.) • Eliminating interest or mission overlap • Promoting effective Club Leadership • Executing the goals and mission statement of the club
Re-Registration of Clubs for 2021/2022 Academic Year

Re-registration is an automated process on CampusGroups for clubs* to complete.

All Clubs must complete this process by

April 21st 11:55 p.m. EST

After this time, any Clubs who have not completed will be locked out of their page. Members will still be able to access the main page, but no new events, event management, budget requests, or emails will be possible from the Club Leaders.

*Groups manually update their pages, and work with their parent club to submit budget requests for their planned Fall events.
What does the Re-Registration Process Ask For?

• Club Mission, Logo, Category update etc.

• New Club Leaders (incl. Budget Officer) on CG.
  • When entering this, include both current & incoming!

• Re-Registration Form:
  • Current membership
  • CDO Liaison
  • Programming considerations for incoming leaders
  • Major Event Planning or potential Conferences*
  • General institutional knowledge gathering
  • 20/21 Offline budget and budget plans for next year
Club Major Events 2021/2022

When is a Club event a major event?

Any, or a combination of, the following:
• 130+ people • multiple classrooms • using either the Beinecke or other large social space in building • is considered the ‘flagship’ event for the Club • high-profile speaker

Important to complete on the Re-Registration form
• AASL coordinates holding a date, time, location (COVID pending), based on your initial requests
• After this, it is up to the Club in the Fall to continue planning your event
• All advance planning is pending final academic courses scheduling, no guarantees

Conferences and Case Competitions run on a separate process, talk to Kit!
How to do the Re-Registration:

1. Find your group and click the cog icon.
2. Click on the blue button to complete your re-registration.
Budget Submitting for 21/22

By April 21, 11:55 PM EST you must submit initial budget requests for your Fall planned events AND any major events that your organization is planning.

• Use both this year and last year’s budget information you have to plan accordingly.
• Plan as if COVID-19 isn’t a thing and we’ll be back in person (no guarantee, but it’s better to request for the best!)
• The 21/22 budget request season will open in Spring 2.
• Question: do you all know how to submit budget requests? Give a thumbs up if you’d appreciate a quick runthrough!
Transition Checklist

planning  website  how-to’s  budgets

Check the [Handbook](#) for the full checklist!
**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 complete documented 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 planning 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 features 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 here and more information: https://groups.yale.edu/handbook/club-re-registration/

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**Incoming Leaders Outreach**

**Next Steps for Transition**

- **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 Training 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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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 features of your officer rights on the Club page. Meet with your outgoing Club Leaders to complete this process.

See the guide for completing your re-registration process on the Club Handbook here and more information: https://groups.yale.edu/handbook/club-re-registration/
Transition Key Dates for Clubs

Important for both Outgoing and Incoming Club Leaders.

Outlook holds will be sent soon from AASL.

19 MON APR
INCOMING & OUTGOING LEADERS

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

11 TUE MAY
OUTGOING LEADERS

24 MON MAY
INCOMING LEADERS

LAST DAY TO HOLD A CLUB EVENT IN SPRING 2

INCOMING LEADERS ASSUME ROLES
<table>
<thead>
<tr>
<th>Rank</th>
<th>Action</th>
<th>Description</th>
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<tbody>
<tr>
<td>3</td>
<td></td>
<td>Since we were virtual this year, ensuring no gaps exist when things get back to in-person next year</td>
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<tr>
<td>2</td>
<td></td>
<td>Inter-gen whatsapp</td>
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<td>2</td>
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<td>Google docs</td>
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<td>2</td>
<td></td>
<td>Shared documents</td>
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<tr>
<td>1</td>
<td></td>
<td>Sending them the screenshots from this call that maybe should have happened after March 5?</td>
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<tr>
<td>1</td>
<td></td>
<td>Try to convey how things worked pre-covid</td>
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<td>Organized communication and expectations</td>
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<tr>
<td>0</td>
<td></td>
<td>Post transition period, grace period for people to still reach out</td>
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<td>0</td>
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<td>Open forum and registration walkthroughs</td>
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Sponsorship Process for AY 21/22
Yale SOM Club Sponsorships

• Uniform sponsorship menu offered to all employers (including all clubs)
• Sponsorship information will be included in CDO kickoff sent to employers Spring.
• Clubs will be notified of sponsor interest
  • By accepting funds, clubs agree to promote each employer according to the promised branding benefits
  • Sponsorship funds must be used according to existing Yale SOM purchasing and funding policies
• Clubs have the right to refuse funds from any sponsor
• Unique requests later in the year may be addressed to SOMClubs@yale.edu to review

https://groups.som.yale.edu/handbook/corporate-sponsorship/
THANK YOU!

No really, thank you.
To say thank you even more, have a meal on us...

Grubhub voucher coming to every 2Y MBA club leader in April.

More to follow on this!
Questions?