

RIT Clubs Leadership Transition Handbook



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CLUB CENTER CONTACT INFORMATION

Club Center

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Assistant Financial Coordinator
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Carol Giuliano
Clubs Budget Assistant
cagccl@rit.edu
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Becca Delaney
Coordinator for Marketing & Event Services
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475-7651

QUICK RESOURCES AND REFERRALS

Club & Advisor Issues

Sarah Griffith, 475.6128, sbgccl@rit.edu

Club Recognition | Club Review Board

Clubs Graduate Assistant, 475.4483, clubs@rit.edu

Competitive Sports Club Federation

Clubs Graduate Assistant, 475.4483, clubs@rit.edu

Additional Funding – Student Government | Club Travel

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Club Budget Questions

Carol Giuliano, 475.5798, cagccl@rit.edu

Event Registration Procedures | Marketing

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Leadership Training – RLI

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Risk Management

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Van Usage – Student Government

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SAMPLE TRANSITION BINDER OUTLINE

*Below is a listing of information and documents that are recommended to include while building a transition binder.
Depending on your club or organization you will need to adapt the following outline to fit your needs!*

- 1. Club Center Contact Information**
 - a. Club Center Contact Information
 - b. Quick Resources and Referrals
 - c. RIT Helpful Websites
- 2. Club History**
 - a. Mission Statement
 - b. When was the club/organization founded?
 - c. Important Alumni Information
- 3. Club Contact Information**
 - a. General club contact information
 - Facebook account information & password
 - Twitter account information & password
 - General club email address & password
 - b. Current executive board's contact information
 - Member & officer contact list
 - Signed executive board contracts
 - c. Previous executive board's contact information
 - Member & officer contact list
 - d. Advisor information
 - Department, office location, & contact
 - Role on campus
 - Officer job descriptions
 - e. Other organizations / Community Liaisons:
 - List of agencies + contact info.
 - Funders (List of companies + contact info.)
- 4. Club Constitution**
 - a. Note of any recent changes
 - b. Bylaws if applicable
- 5. Calendar of Events/Annual Events/Signature Events**
 - a. How to EVR/Reserve an Event
 - b. Notes on annual/signature events with:
 - i. Timeline of event
 - ii. Methods of publicity used
 - iii. Important contacts (partnerships and/or sponsorships)
 - iv. Location information and contacts
 - v. Media coverage and contact information
 - vi. Budget for event
 - vii. Improvements to be made

TRANSITION BINDER OUTLINE (CONTINUED)

6. Public Relations

- a. Newsletters
- b. Promotional/recruitment flyers
 - Copies (hard and/or electronic of past fliers)
- c. Additional public relations materials
 - Alternative methods of recruitment used
 - Recent Press
 - Pictures

7. Financial Overview

- a. Current Budget
- b. Finance cheat sheet
- c. Information on grants and other funding

8. Club Connections

- a. Instructions
- b. Club Recognition Applications
- c. End of the Year Reports

9. Additional Information

- a. Awards & Recognition
- b. Forms
- c. Templates

TRANSITION OVERVIEW

A successful leadership transition process should be carefully planned out. There are four key phases to a transition; Pre-Transition, Preparing for the Transition, Passing the Torch and Thinking Ahead for the Fall. The bulk of the transition will occur in the Spring semester but it's important to carry out the transition through the summer to be fully prepared for the Fall quarter.

PHASE 1: PRE- TRANSITION

The following should have already been accomplished:

- Elect your new Executive Board- make sure to hold elections early enough to leave yourself enough time for a successful transition!
- Finish all necessary correspondence (paperwork, letters, emails, phone calls)
- Submit your budget request to Club Center (early April)
- Submit End of the Year Report through Club Connections (early May)
- Develop action plan and time-line for new officer transition

PHASE 2: PREPARING FOR THE TRANSITION

Complete the following:

- Executive Board Contact information for new academic year
- Introduce all new e-board members to advisors

Preparing information for the incoming e-board:

- Invite the incoming executive board members to attend a meeting led by the exiting executive members- this will help new e-board members to understand the roles and responsibilities of their respective leadership positions
- Organize files (paper & electronic) to ensure proper documentation
- Create transition binders (see “Transitions” Binders page 7)
 - Each incoming officer should be provided with an organized binder
 - Give your predecessor a tour of the binder- don't just pass it off!
 - All officers should have a copy of the following:
 - Executive board contact list
 - Constitution/ by laws
 - General “job” description
 - Key Administration Contacts
 - Exit Interview
 - End of the year report & evaluation

PHASE 3: PASSING THE TORCH

Schedule Transition Meetings:

- Ideally, the outgoing President/Vice President should meet one-on-one with the incoming President/Vice President and include the advisor during the Spring quarter.
 - Topics of discussion:
 - Calendar
 - Goals for next year
 - Past, current, and future issues
 - Financial status of club/organization
 - Expectations of roles
- Hold a joint meeting for the outgoing and incoming executive board. Think of this as an adjustment period.
 - Suggestions for agenda:
 - Introductions
 - Review of constitution
 - Review the goals and accomplishments of current year
 - Handle unfinished or pressing business
 - Break into one-on-one meetings for each position
- If time permits, hold a **transitions retreat** with the incoming executive board. As part of your retreat include team builders to foster good working relationships. Team Builders will allow you to learn a great amount about your organization and is a stepping stone to building a strong team.
 - Outcomes of holding a retreat:
 - Increase and foster open and honest communications
 - Builds positive social relationships
 - Develop trust and mutual support
 - Builds respect...appreciation of differences
 - Builds pride for your group
 - Use the uniqueness of members to accomplish goals

PHASE 4: THINKING AHEAD FOR FALL

Fall can be a busy time of the year! Plan ahead and think of the following items over the summer so that you are fully prepared for your new leadership position!

- Introduce e-board members to advisors and other key administrators
- Prepare for the Fall Club Fair (Register online at clubs@rit.edu)
- Update constitution, job descriptions to make sure that they accurately reflect the organization
- Informal meetings to encourage group bonding and support
- Review rosters on Club Connections and update as needed
- Update calendar
- Create timelines
- Become familiar with the Club Center

OUTGOING EXECUTIVE BOARD TRANSITION DISCUSSION TOPICS

Goals:

What were the goals, and how well did we do on each goal?

Which goals should be continued?

Which goals should be altered?

Which goals should be dropped?

Programs and Activities:

What activities and programs did we sponsor?

How effective was each program?

Did we do any community service activities?

Were the programs and activities consistent with group goals?

Which activities should be continued and which should be dropped?

Membership:

Do we currently have just enough, too few, or too many members (in light of the group's goals)?

How effective were our membership recruitment efforts, if any?

Are the members actively involved in the operation of the club (including decision making, planning, implementing, and evaluating)?

Are members enthusiastic about the activities and motivated to work towards the group goals?

Officers and Organizational Structure:

Do officers understand their responsibilities and roles within the organizational structure?

Did the officers operate as a team or could cooperation between officers be improved?

Is the amount of time and effort required of each officer equal, or are some expected to work harder than others?

How would the general membership evaluate the effectiveness of the officers?

How would the officers evaluate the effectiveness of the officers? What could be improved?

Organizational Operation:

Was the budget managed properly?

Were meetings run effectively?

Was the frequency of meetings appropriate?

Do we experience scheduling conflicts with other groups or activities?

Additional Notes:

EXECUTIVE BOARD CONTRACT

I, _____ accept the position as _____
Full Name E-board Position
on the 2012-2013 (*Example Organization*) Executive Board. I fully accept all responsibilities of the position as listed in the position description and as delegated to me by the President, Vice President, and Advisors. I will adhere to the regulations set forth by the Club Center and Student Government. I understand that all organization meetings and events are mandatory, unless otherwise stated. I will do my best to represent (*Example Organization*) on campus and in the community and be an active, engaged member of the executive board. If I fail perform my responsibilities or to meet the expectations presented to me, I understand that action will be taken and I can be removed from the (*Example Organization*) general assembly.

Signature

Date

Advisor

Date

INCOMING E-BOARD QUESTIONNAIRE

List 3 things that made you want to run for this office and why:

- 1.
- 2.
- 3.

List 3 new ideas that you would like to implement for your position this year:

- 1.
- 2.
- 3.

List 3 important foreseeable problems in your position:

- 1.
- 2.
- 3.

List possible solutions to the above 3 problems:

- 1.
- 2.
- 3.

Please think through and respond to the following questions regarding your responsibilities. Think of this information as a to-do list- it will be very helpful to your successor!

1. Things specific to the position I want to know about (forms, duties, etc.)
2. Things I should do before the semester begins...
3. People (positions) that I should get to know...
4. Services that I need to know about...
5. Things I need to know about working with my advisor...
6. Other questions I wanted answered...

MEMBER & OFFICER CONTACT SHEET

Organization Information

Organization E-mail: _____

of Current Members: _____

Primary Contact Person: _____

Street Address: _____

Phone Number: _____

Please complete only that which is applicable.

Organization Web Site: _____

Date of Next Elections: _____

Title: _____

City/State/ZIP: _____

E-mail Address: _____

Officers

If you have additional officers, please attach a list to this form.

Name: _____

Title: _____

E-mail Address: _____

Name: _____

Title: _____

E-mail Address: _____

Name: _____

Title: _____

E-mail Address: _____

Name: _____

Title: _____

E-mail Address: _____

Name: _____

Title: _____

E-mail Address: _____

Name: _____

Title: _____

E-mail Address: _____

Members

RIT HELPFUL WEBSITE LINKS

Center for Campus Life:

<http://campuslife.rit.edu>

Clubs and Organizations:

<http://clubs.rit.edu>

How to Form A Club:

http://campuslife.rit.edu/main/form_club/index

Budgeting Resources, Documents, Applications, Referrals:

<http://campuslife.rit.edu/main/clubs/resources>

RIT Club Finance Certification:

<http://campuslife.rit.edu/cfc/cfc.swf>

Free Marketing: Staff Artist Request:

https://webapps.rit.edu/cas/login?service=http://campuslife.rit.edu/main/art_request/displayForm

RIT Events Calendar:

<http://events.rit.edu>

Event Registration:

<http://campuslife.rit.edu/evr>

RIT Homepage:

<http://rit.edu>:

College Activities Board:

<http://cab.rit.edu>

Student Government:

<http://www.sg.rit.edu>

My RIT Portal:

<http://my.rit.edu>

(find your UID here)