

# TRANSITIONAL DOCUMENT TEMPLATE

The objective of this document is to provide campus clubs and organizations with a tool to assist executive members with leadership transitions. This document is a template that should be modified for each group depending on their scope and needs. As you may be entering confidential and secure information in this document, it is important that you embed this document with a password. Do not enter personal information in this document (only organizational information). Limit the amount of hard copies printed to ensure the security of the information.

New executives are encouraged to change the passwords to ensure additional security from year to year.

This template was developed by the Ulife service center team and is meant to be a guide for Campus Clubs and Organizations. Campus Clubs and Organizations can determine how to share this information (whether in this document or in person). This document serves as a reminder for a smooth transition.



# COMMUNICATIONS

## U Life

The Ulife website is the central source of a large and diverse collection of student clubs, organizations, and activities on all three U of T campuses. Ulife is also where you apply for recognition of a student organization through your campus student life office. Recognized groups enjoy several benefits, including:

1. The right to use the University's name in your group's name
2. Use of University facilities (i.e. room bookings through Campus Room Finder and ACE) at no or a lower cost compared to external organizations
3. Eligibility to apply for office space at the 21 Sussex clubhouse.
4. Free access to web services (i.e. website hosting) for the group
5. Bank and recognition letters
6. Online listings on the Ulife website
7. Access to funding. There is a list of funding applications listed on the Student Life website, which your club can apply for!
8. Access to leadership, mentorship, and clubs workshops that are listed on CLNx
9. Eligible to apply for Co-Curricular Records for club executive members

Groups are also required to submit annual renewal applications on Ulife in order to maintain these benefits.

Our organization is listed as [REDACTED] under ULife

The current Primary Contacts are: [REDACTED]

Our ULife Recognition will need to be renewed by: [REDACTED]

To complete the Recognition process, you will need to upload the Constitution for the organization, group description, and some basic contact information. Our Organization's constitution (which contains group description) can be found at:

[REDACTED]

Recognition through the ULife website can take 3 to 5 business days. However, applications missing complete contact information, group details, and the group's constitution can delay the process further.



Revisions to a group's constitution or missing group information can extend the processing period. During peak application periods from August to October, the recognition process can take up to two weeks. Your group should receive a follow-up notice from the respective office after they review your submission.

St. George campus questions can be made to the Office of Student Life at groups.officer@utoronto.ca or 416-946-7780. You can also visit the Ulife and Ulead Resource Centre at 21 Sussex Avenue, 5th Floor, Room 516 for assistance in person.

## Google Drive

Our organization has a Google Drive that contains club materials from all years (highlight any relevant)

The Login Information for Google Account is as follows:

Username

Password

## Club Email

Our organization has one/more email accounts (highlight any relevant)

The Login Information for Email A is as follows:

Username

Password

Main Function

The Login Information for Email B is as follows:

Username

Password

Main Function

## Facebook

Our organization has a Facebook Page/ Group/ Profile (highlight any relevant)

The Login Information for Facebook is as follows:

Username

Password



## Instagram

Our organization has an Instagram account (highlight any relevant)

The Login Information for Instagram is as follows:

Username

Password

## YouTube

Our organization has a YouTube account/ channel (highlight any relevant)

The Login Information for YouTube is as follows:

Username

Password

## Additional Social Media Account (ie. Twitter, Pinterest, etc.)

The Login Information for  is as follows:

Username

Password

## Website

Our group has a website. The website address is:

The person/ people responsible for updating the website this year have been (please include their email address or other form of contact):

Usernames for managing our website is:

Password for managing our website is:

Our website contract is through:

Further information/ helpful documents on managing the website can be found:



## Phone

Our organization has a phone. The phone number is:

The phone is set up with voicemail. The password is:

The following are instructions for changing the voicemail greeting:

Our phone contract is with:

The phone account number is:

Instructions for paying phone bills and account information link:

If cell phone, the model number is:

If cell phone, the manual can be found:

If cell phone, it is available for an upgrade on:

If cell phone, chargers for the phone can be found:

## Locker

Our organization owns a locker.

The locker information is as follows:

Location:

Lock password:



# BANKING/FINANCIAL INFORMATION

Our organization has a Bank Account at the following Bank (BMO, RBC, TD, etc):

The Name of the Account is:

Our Account number is:

The Primary Account Holders  
currently are:

Our primary contact at the bank is:

Their contact information is:

Instructions on changing the signing authority (link):

We have one/more Debit Cards  
(yes/no):

The current holder of card A is:

The card A is located:

The PIN for the Card A is:

The current holder of card B is:

The card B is located:

The PIN for the Card B is:

We have a Credit Card (yes/ no)

The Signing Authority on the card  
is:

Our limit is:



**Online Banking:**

Our username is:

Our password is:

Last year's Financial Statements/ Spreadsheets/ Budgets can be found at:

Last year our Treasurer/ person in charge of Finance was:

Their Contact info is:

We have a cash box. It is located:

The cash box has a key, it is located:



## MEMBERSHIP AND EXECUTIVE TEAM

Our organization's membership lists and contact information for past years can be found at:

Our organization's executive lists and contact information for past years can be found at:

Our organization's recruiting materials for past years can be found at:

Tips and Instructions on recruitment and marketing strategies can be found at:

## OTHER AFFIRMATION/RECOGNITION

Our organization is also recognized by:

Documents and Resources related to the above affirmation can be found in this link:

Our organization is also recognized by:

Documents and Resources related to the above affirmation can be found in this link:





## FUNDING & SPONSORSHIP

Our organization has received funding/sponsorship from: (List name, organization, contact information, how much was received, what the money was used for)

Name	Organization	Contact	Amount Received	Purpose

\*Important prompt that letter of recognition/ thank you should be sent out to the sponsoring organization by end of the year including information on the new executives transitioning into the role.

Templates of recognition/ thank you letters can be found at:

Templates of funding/sponsorship request letters can be found at:

This past year our organization did the following Fundraising activities:

