



STUDENT  
GROUP  
SERVICES

# EXECUTIVE

- ▲ THE BASICS
- ▲ SKILL DEVELOPMENT
- ▲ PRACTICAL RESOURCES

SGS HANDBOOKS

# Welcome to the Student Group Services 2013 - 2014 Executive Handbook!

This handbook will make your life as a student group executive member much, much easier. It includes a wide variety of the information you need to get set up for the year, and some handy tips to help with the functionality of your group.

If you have any questions, don't hesitate to stop by. Our door is almost always open, and even if you just feel like ranting, or want to run some half-formed idea by us, we'd love it if you stopped by to chat.

Also—because I am sure you were wondering—the awesome staff at SGS never turns down baked goods, hot beverages, or sugary treats. If you'd like to invite us to your bake sales or BBQ, feel free to post on our facebook page or tweet us so we know!

Sincerely,

*Student Group Services Staff*

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[www.facebook.com/uasgs](http://www.facebook.com/uasgs)  
[twitter.com/#!/uasgs](https://twitter.com/#!/uasgs)  
[alberta.collegiatelink.net/organization/studentgroups](http://alberta.collegiatelink.net/organization/studentgroups)

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## Legend:

❖ <a href="http://www.su.ualberta.ca/studentgroups">www.su.ualberta.ca/studentgroups</a>	SGS Website
◆ <a href="http://www.bearsden.ualberta.ca">www.bearsden.ualberta.ca</a>	BearsDen



# 1 :: *The Basics*

## A :: REGISTRATION

### Why Register?

Registering as a student group offers a multitude of benefits, including:

- :: free booking of rooms and tables on campus
- :: 6 staff members to assist you with your every need
- :: discounted booking of Students' Union venues like Dinwoodie Lounge & Dewey's
- :: discounts at SUBprint, on food at Room at the Top (RATT) & Dewey's, and MUCH more with the Executive VIP Card
- :: access to up to \$5000.00 worth of grants for your group
- :: access to events hosted by Student Group Services, such as Clubs Fair & the Leadership Summit
- :: ticket distribution for events through InfoLink
- :: credibility as a recognized student group at the University of Alberta
- :: potential insurance coverage
- :: ability to rent projectors, projector screens & more from Student Group Services

*Please note that for the 2013-14 year we are not offering any office space or locker rentals due to the renovations in SUB—but in general, registered groups will have access to that space as soon as it's available!*

### Requirements

To start a student group, you need a few basic things:

- :: 10 student members
- :: a membership breakdown that satisfies the level you are registering at
- :: a bank account (if you're handling ANY money - we can help you start this!)
- :: a constitution
- :: a liability agreement signed by your president and your vice-president (or equivalents).

Registering as a student group means you get to choose your membership level! You can choose to register with the **University of Alberta**, the **Students' Union**, or the **Graduate Students' Association**. The eligibility for these registration levels is defined below, and there are bylaws and procedures that you'll need to make sure you know. ❖

	MEMBERSHIP	EXECUTIVE
<i>University</i>	2/3 must be students*	3/4 must be students*
<i>Students' Union</i>	2/3 must be undergraduate students	3/4 must be undergraduate students <i>President &amp; Treasurer must be undergraduate students</i>
<i>Graduate Students' Association</i>	2/3 must be graduate students and the group must be academically related	3/4 must be graduate students <i>President must be a graduate student</i>

\*Note: If your group is a fraternity, women's fraternity, or sorority on the University of Alberta campus, all of your members must be students at the University of Alberta.

Student groups are also responsible to:

- :: maintain good financial practice and records
- :: ensure that registration information is submitted on time and is accurate
- :: abide by and maintain the content of their constitutions
- :: attach group's name to any publications created and made public by that group
- :: file any changes to their registration with Student Group Services
- :: follow appropriate risk management policies & procedures
- :: communicate with Student Group Services.

### Process

BearsDen is an online database that provides groups a more public forum to communicate with potential new members interested in involvement. It also is the way to get your group registered and moving! (See the next section for more information.)

To register your group, fill out the **Registration Form...**

- :: Visit [www.bearsden.ualberta.ca](http://www.bearsden.ualberta.ca)
- :: Using your CCID and password, you can gain access to the registration form
- :: Need to take a break? No problem! BearsDen saves your progress automatically as soon as you go to the next page
- :: If your group was registered and approved in 2012–2013, you can also access a **Re-Registration Form** that will retain some of your group's information—ask SGS if you have questions about this process
- :: If your group was registered in previous years but not for the 2012–2013 year, please fill out the **Reactivation Form** on SGS's BearsDen Page under the **Forms** page: once SGS has received and approved your application, we will grant you access to the current registration form so you can register with your previous group name
- :: For support, you can always see our FAQs❖ or the SGS BearsDen page ♦

### Constitution

- :: Your constitution will be required in the BearsDen form—save the document as a pdf in order to upload it properly!

- :: SGS will contact you if anything needs to be changed
- :: Be sure to use the Constitution Handbook and review your constitution every year! ❖❖

### **Liability Form**

- :: This must be signed by the President and Vice-President/Treasurer
- :: A physical copy may be submitted to the SGS office (SUB 0-22) during operating hours
- :: We also accept scanned copies! Those can be submitted through email at clubs@su.ualberta.ca.

### **Additional Information**

You might also require...

#### **Insurance**

- :: If your group is a registered non-profit or other legal entity, or involved with high-risk activities, you should have your own insurance policy – and you'll need to provide SGS with proof of this
- :: Make sure you check your policy to see if "The Governors of the University of Alberta, The Students' Union, and The University of Alberta" are listed under the "Additional Insured." If not, please contact your insurance company to make the appropriate changes.

#### **Bank Account**

- :: If your group will be handling money in any way whatsoever, you need a bank account (and SGS can help you set one up).

#### **Affiliate Letter**

- :: Groups that are closely affiliated with external organizations, charities, or businesses must submit an affiliate letter with registration
- :: SGS will contact you if this is required—so don't worry about having this done before your registration is submitted.

**In order to maintain official status, each group's executive must re-register the group every year. Make sure that you know all the registration deadlines!**

### **B :: BEARSDEN**

BearsDen is the student engagement platform that was first acquired in 2011 by the University of Alberta. Student groups are required to register on BearsDen, but the system also offers a lot of opportunities for groups to manage, market, and promote themselves. By filling out the online form and getting your group approved, you will get a BearsDen profile page for your group automatically. You don't have to use the page—but if you have your own website, it's best to set up your profile on BearsDen so you look active, and then link to the external site. However, with university staff, students,

and services checking out BearsDen daily—and with Orientation groups using BearsDen to preview campus—why wouldn't you want to take advantage of it?

The functionality of your group page on BearsDen is very similar to that of a Facebook page; it allows for an updatable profile where you can post events, pictures, and updates from your group. In addition, the 5000-7000 students that go through Orientation each year register through BearsDen, which gives your group HUGE publicity. It is important to update your page, keep the membership current, and show everyone that you are an active group on campus!

Another important reason to keep your group profile up to date is that in order to access group perks, the numerous departments on campus will use BearsDen to view your group details and executive roster. **If you are not listed as an executive, you cannot access group perks & discounts.** If not for the publicity, or the access to group perks, then update your page for a chance to receive numerous prizes from SGS for being active on BearsDen! We'll roll out several contests throughout the year.

BearsDen is an extremely useful tool and can perform a vast number of services and functions that will benefit your group; spend the time to learn what it has to offer. Here are a couple basic things you NEED to know about BearsDen. Make sure to check out the site itself, or our website, for lots more information!

## **Registration**

Registering a new group is a relatively simple procedure. The form might look long, but it's complete with a step-by-step walkthrough, and SGS provides you with handy templates wherever they are necessary. In addition, if you need to take a break from the application, BearsDen will automatically save your progress! Here's a short walkthrough:

### **First:**

- :: Go to [www.bearsden.ualberta.ca](http://www.bearsden.ualberta.ca)
- :: You'll reach a U of A Landing Page, so click the first link there to get to the BearsDen home page
- :: Click **Log In** (top right corner) and enter your CCID and password
- :: You can update your profile at any time to make full use of BearsDen, including your notification settings and your interests (BearsDen uses these to make group recommendations to you!)

### **To Register:**

- :: Click **Organizations** on the main navigation bar
- :: Select the **Register** button on the left, below the menus OR follow the "Need to register a new student group?" link on the BearsDen home page
- :: Complete the form—it's important that you fill out everything as accurately as possible. (For example, if we ask you for a copy of a document or a piece of contact information, make sure you provide it! This will speed up the review process and get you on your way.)

### **To Access A Form You've Started:**

- :: Click on **My Involvement** in the top-most menu (once logged in)
- :: Select **Submissions**
- :: Navigate to the **Organization Registrations** tab
- :: Click on the little magnifying glass and you'll be able to access your application again

Also, questions about BearsDen can be found on the FAQ section of our website—we add to them regularly! ❖

Here are a few resources BearsDen offers:

- :: access to forms required for events, rentals, and many other things
- :: the ability to network and share resources with other groups
- :: the opportunity to recruit individuals who may not have been aware of a club's presence
- :: free marketing of group events on the BearsDen homepage
- :: online submission of event proposals
- :: access to Student Group Granting Applications and granting resources
- :: the ability to create your own forms and applications on your group's page
- :: a centralized location to upload documents & forms for group or public access

### **Executive Responsibilities**

If you are an executive of your group, or you registered your group, you're automatically an administrator on your group's BearsDen profile page. As such, you have a lot more control over the content on your group's page—and over the members. To grant administrative access to an individual of your group, click on "Roster" on the sidebar of your group's BearsDen organization page:

- :: If the individual is already a member of your group, simply assign a position by clicking on "Manage Roster" on the sidebar and clicking on the "Edit Positions" button. You can choose the appropriate position you want to assign.
- :: If the individual is not yet a member of your group, click on "Invite People" on the sidebar. Type in their ualberta email address and click on "Add E-mail Addresses". Then choose the position you would like them to have and send the invitation. Once they have accepted the invitation, they will have administrative access.
- :: Please ensure that the position has the appropriate level of access by clicking "Manage Positions" on the sidebar, choose the position you want to check and under "Set Management Access" choose the level you want this individual to have.
- :: SGS requirements and registered student group responsibilities are outlined in the document linked below: <https://alberta.collegiatelink.net/organization/studentgroups/DocumentLibrary/View/5988>

## **Student Leader Guide**

The Student Leader Guide can train you on how to operate your BearsDen page. It's right on the FAQ page on SGS's website! ❖ CollegiateLink, the company that produced the BearsDen system, also offers a number of free webinars that you can attend to learn how to use BearsDen to the greatest advantage. If you browse the Help section on BearsDen, you can find some great resources there too.

## **Support & Feedback**

SGS (and InfoLink) will be happy to help you with any questions or concerns about BearsDen processes. If you are running into problems with the site, whether it's a technological bug, a recurring error message, or finding out that the site just doesn't do what you need it to, please email us! We need to know what's not working so that we can fix it, and push for more developments. (This doesn't mean we'll love receiving a 20-page rant on how much BearsDen and the University sucks, but hey—if you need to vent, just warn us!)

# **2 :: Skill Development**



## **A :: GOVERNANCE**

Governance ensures that groups have a good foundation, making it easier to accomplish your goals. Governance, as it applies to student groups, can be broken down into three helpful pieces: your constitution, your meetings, and your elections.

### **Constitution**

It is crucial to understand the importance of your constitution. Not only is it the most common reason for denial of a group's registration application, it's also your go-to governing document. When conflict arises, your constitution will have the final ruling. If you come to us with a question or problem, we refer to the constitution first and foremost. SGS reviews hundreds of constitutions over the year, so even we can miss something—make sure you're giving it a really close and careful look. You should review your constitution regularly and edit all content that is out of date, irrelevant, or unrealistic.

### **Common Constitution Problems**

- :: Student groups are expected to be democratic—make sure that your entire organization has a say in who makes up the executive, and a way to appeal that. You should also include a complete election process. At the bare minimum, we ask that you include a basic process for your elections (who's in charge of ensuring they run fairly, when they run, and how they run); we would really recommend you go into a bit of detail, however, since if any issues do ever arise, SGS only can refer to your constitution

to help your executives sort them out. If your constitution is silent on an issue, there's little we can do to help back you up.

- :: Amending your constitution is important, and many groups forget to include a process for doing so! (But keep the above point in mind—your entire group needs to know and have a say in what changes are made to the constitution.)
- :: Your VP Finance should not be the only person with signing authority on a group bank account, just in case he or she decides to go rogue and use all \$123.00 of your group's money to go on a tropical Leduc vacation. Groups are required to have at least 2 executive positions with signing authority.
- :: Make sure you have a definition of members in good and bad standing, and back-up plans outlined if an executive falls into bad standing. What is your group planning to do if one executive member decides (s)he hates the group? What if something serious happens, and your president is unavailable for half a year? How will you evaluate if an executive is not performing the duties expected of them? (Make sure you outline every position's responsibilities, and record as much as you can.)
- :: Define quorum—is it 2/3 of your group, or 15 members?—and don't discriminate!
- :: Groups should outline a dissolution process. We'd like to know what happens if your group shuts down. Right now, SGS sees a fairly high level of turnover in groups from year to year; if your group runs into any dissolution issues, we'd like to be able to help you out and make sure that your group's decisions (especially for what to do with leftover resources or supplies) are respected.
- :: Remember, our constitution requirements may change from year to year so please re-evaluate your constitution each year to ensure all required sections are included. If it's something that SGS requires for your group's registration, there is no need to follow amendment procedures. We also update the Constitution Handbook every year with types of things we expect groups to have outlined in their constitution. Be sure to take a look for the most up-to-date requirements!

## **Meetings**

Your group should have three types of meetings:

- A) *Annual General Meeting*: usually where elections are held & changes to your constitution are passed.
- B) *General Meetings*: at least once per semester. This is where members are updated on recent events or projects, and official business that must be voted on by members (according to your constitution) can be passed.
- C) *Executive Meetings*: anywhere from once per week to once per month. This is where the detailed planning & operating of your student group happens.

Consider using some of Robert's Rules of Order at your executive meeting (refer to our Robert's Rules of Order Handbook). Also, ALWAYS use an agenda, since it will be incredibly useful in keeping your group meetings on track—most students don't have time for a 3 hour long weekly meeting that was planned to only take 1 hour. And we can't over-emphasize this—**you need to take meeting minutes!** If anyone contests your group about a decision, it is important to have a paper trail to go back to. (Minutes are also a handy transition tool for new executives!)

## **Elections**

It is mandatory that your group allows its members a democratic chance to elect who is on the executive committee. It is imperative that quorum is specified for an election, and that a clear process has been outlined and agreed upon by members. Make sure that your group members understand the process, too! The SGS staff would be more than happy to discuss the election options available to you.

Another thought would be to assign an external Chief Returning Officer (CRO) to oversee the elections. Some groups hire this individual, but if your group is small and would just like someone to help count votes and monitor the process—ask us! SGS can help out with your elections for sure. (Just try to give us enough time to work it into our schedule!)

## **OTHER TIPS FOR ELECTION PROBLEMS:**

- ▮ Food: always a large draw for meetings, and something you may want to look into if you're worried about attendance and meeting quorum!
- ▮ Personal connections: worried no one will actually want to sit in on your executive committee? More often than not, your members just haven't thought of it, or do not think they are capable. Take the time to approach members you think would contribute to the group as an executive and encourage them to run.

## **Leadership Summit**

This conference is a unique opportunity for Student Group executives to improve their executive skills and network with executives of other groups. SGS provides dinner, lunch, and a whole host of sessions and networking opportunities—from governance and event planning to group marketing and social media, the topics covered will appeal to every level of group.

If a student group sends two executives to the entirety of the Summit, SGS offers an increased granting cap of \$5,000 for the year, rather than the usual \$2,500. This year's Leadership Summit will be held in CCIS on September 20 and 21—make sure to register for it in September! Email us at [clubs@su.ualberta.ca](mailto:clubs@su.ualberta.ca) with any questions or suggestions.

## B :: FINANCE

### Bank Accounts

Your group needs a bank account for security of any funds raised through membership dues, fundraising, event ticket sales, and any grant money your group receives. As an added security measure, there must be a minimum of two signing authorities per account, and all cheques must require two signatures. Your group should not have a cash-withdrawable or payment-enabled debit card for financial security reasons.

The process to open a bank account is as follows:

- 1) **Complete the registration process**
- 2) **Letter of confirmation:** following approval (or submission & review of all your materials), we can provide you with a letter of confirmation for the bank stating that you are a registered student group. To prepare this letter, we'll need the full names of the executives who will be the signing authorities. Make sure that your bank account name matches the registered name of your group!
- 3) **Make an appointment to open an account:** BMO Bank of Montreal (Windsor Park—University District) is the nearest full-service branch, and the only bank to offer their Community Account to student groups at no charge. It is located at 11630 - 87th Ave., & the phone number is 780.441.6580. You are more than welcome to go to whatever branch you choose—but be sure to check out our handy chart below of all local banks and what they have to offer. Just remember that you will need all of the signing authorities present when you go to open the account, so plan accordingly! ❖

### Student Group Banking Options for 2013 - 2014

BANK	NEAREST BRANCH	ACCOUNT TYPE	MONTHLY FEE	WHAT'S INCLUDED	CONTACT
Bank of Montreal	Windsor Park 11630 87th Ave	Community Account	FREE	<ul style="list-style-type: none"> <li>- 20 transactions per month (5 in-branch deposits max)</li> <li>- \$1 for each additional transaction</li> <li>- Complementary Cheque books</li> <li>- Up to \$5000 cash and \$500 coin deposit</li> <li>- Up to 50 cheque deposits per month, \$2.25 for each additional \$1000 cheques</li> </ul>	780.441.6580
Servus Credit Union	Petroleum Plaza 10747 100th Ave NW	Community Choice	FREE	<ul style="list-style-type: none"> <li>- 25 transaction per month</li> <li>- \$0.75 for each additional transaction</li> <li>- Free statements</li> <li>- Complementary Cheque books</li> </ul>	780.415.4200
RBC	Old Strathcona Branch 10843 82nd Ave	Community Account	\$3.75	<ul style="list-style-type: none"> <li>- Up to 10 debits/cheques</li> <li>- Up to 5 credits/deposits</li> <li>- Up to 10 items deposited at once</li> <li>- Up to \$1,000 cash deposited</li> </ul>	780.448.6900

Scotiabank	10537 82nd Ave	Community Account	\$2.50	<ul style="list-style-type: none"> <li>- 10 transactions per month</li> <li>- 10 items/cheques deposited monthly</li> <li>- \$2,500 maximum cash deposit per month</li> <li>- 200 complementary cheques, \$14.82 for each additional 200 cheques</li> </ul>	780.448.7800
TD Canada Trust	10864 82nd Ave	Community Plan	\$1.95 Monthly Fee is waived if over \$5000 in account	<ul style="list-style-type: none"> <li>- 5 transactions per month</li> <li>- 15 items deposited monthly</li> <li>- \$1 for each additional transaction, \$0.22 for each additional deposit</li> <li>- \$2,500 maximum cash deposit per month</li> <li>- Cheque books are \$75 for 50 cheques, or \$114 for 200 cheques</li> </ul>	780.448.8450
TD Canada Trust	10864 82nd Ave	Community Plan Plus	\$1.95 Monthly Fee is waived if over \$5,000 in account	<ul style="list-style-type: none"> <li>- 30 transactions per month</li> <li>- 30 items deposited monthly</li> <li>- \$1 for each additional transaction, \$0.22 for each additional deposit</li> <li>- \$5,000 maximum cash deposit per month</li> <li>- Cheque books are \$75 for 50 cheques, or \$114 for 200 cheques</li> </ul>	780.448.8450
CIBC	College Plaza 8207 112th St.	Not-for-Profit Operating Account	\$4.00	<ul style="list-style-type: none"> <li>- 10 transactions per month</li> <li>- \$1 for each additional transaction</li> <li>- 20 cheques to start with</li> </ul>	780.432.1620

If you need to transfer signing authority from an old bank account, SGS can help with that too! Both old and new executives are needed to transfer the signing authority, and we'll need all the names—but we'll also write you a letter for the bank. Transfer signing authority immediately after a new executive takes office, so you don't have to track down the old executive, who might be graduated and long gone if you wait.

You should keep track of your deposits with a deposit book; these books are available at any bank upon request. And keep in mind that **even if the bank offers you one**, your group should not accept a card with withdrawal or debit privileges. This kind of card reduces your financial security, and makes it possible for any one person to take money out of your account independently.

### Budgeting and Fundraising

Templates are available on our website for both a master budget for the year's events, as well as for individual event budgets. These are useful for your own group records, but they're also invaluable if your group applies for a grant - you need to have well-organized, clear budgets. If you require this template, simply navigate to the Resources & Downloads page of the SGS website, or give us an email. ❖

Budgeting can be a really time-intensive and difficult business for student groups. SGS is happy to provide consultations to review your budgets with you, whether

13 or not you're getting granting funds—and if you're a newer group, we can also

connect you with a group that might have gone through the same agonizing first-budgeting process a year or two before. It is often useful to prepare next year's budget at turnover, with the help of the past executives. Keep long-term goals in mind when budgeting and constantly update your budget.

Make sure that you keep everything really clear, though—detailed budgets are awesome. You can use BearsDen to upload budget tracking sheets and resources for your group. And be reasonable with your expectations, because few groups can fundraise thousands of dollars in their first year of operations.

And speaking of fundraising... it's an essential part of almost every student group's life! If you're trying to figure out where to start, Facebook, Google, and SGS are your friends. We've seen a lot of different creative fundraising activities, and we can help you with the logistics and the planning stages. You also should definitely check with us to see if we can connect you with a group doing something similar, because sometimes learning from experience can be costly but learning from an experienced group can be great!

## FUNDRAISING TIPS

- ▮ Barbeques and bake sales might seem unoriginal, but with a few tweaks (theme the food to suit your group or its event!) they can be really successful. Groups tend to raise anywhere from \$100-\$500 a barbeque. Check out our BBQ + Bake Sale Handbooks for more information!
- ▮ With bake sales specifically—pricing treats “by donation” often results in higher revenues than pricing specific items!
- ▮ If your group has an external affiliate, don't be afraid to ask for help. External organizations usually have a really good grasp of what works for their groups and their supporters.

## C :: MARKETING

Try to develop a certain image that sticks in people's minds in regards to your group. If it's a logo or a slogan, great! If it's an event (like a specific beer gardens, or an infamous meatless BBQ or something crazy like that), also great! As long as you're positively associated with something, you'll be more difficult to forget. Here's some SGS tips and tricks for various levels of marketing on campus!

### Social Media

**BearsDen** is a great on-campus way to market, brand, and promote your group. But what are some other ways you can reach out to the giant, diverse campus we call home? ♦

Creating a **Facebook** Page or Group for people who are interested in your group is a phenomenal way to raise awareness and stay connected. The

benefit of Pages over Groups is that you can reach a larger audience and communicate broadly with people who are interested in your student group. Pages are public and anyone can “like” and follow a page. This is useful for groups because they can share updates with everyone! Page admins can also track the Page’s growth and activity by users, which can help to see how many people are accessing your information.

Groups are more beneficial to use internally—they are a closed space for small groups of people to communicate. You could use it for setting up meeting times, having a group discussion or whatever else your group may need that they don’t want to share publicly. Group members have to be approved or added by other members, which means you can restrict the Group to only people that belong in your student group. Note: Groups are limited on the number of members you can add, so it might not be beneficial for larger groups!

Facebook is an exponentially useful tool, and as always the best news is: it’s free! So why not make a group and a page both?

*Speaking of Facebook, make sure you’re on our Facebook Page, Student Group Services! We post a huge amount of useful information on there, & you’ll be the first to hear it! [www.facebook.com/uasgs](http://www.facebook.com/uasgs)*

Although many people are initially under the impression that **Twitter** is useless, it can be a good way to stay informed about things in less than 140 characters. It doesn’t take long to set up, and is a quick way to communicate with people on the go. If that hasn’t convinced you, 65% of Fortune 100 companies have a Twitter account – so it must be useful in some way...

Once you check out some great blogs, you’ll want one too. There are many blogging sites that offer free blogs—check out **Blogger** or **WordPress** to get started! Keep in mind that the more often you blog and the more relevant the posting, the more successful it will be. Blogs can be a great way to keep people in the loop on what you’ve been up to lately in more detail than you would use on Facebook. Did you have a really successful bake sale? Maybe recruited a ton of new members? Write a fun entry about that and spread the word by sharing the post with your followers on Twitter or Facebook!

Through AICT, you can get a website with a [www.ualberta.ca/~studentgroupname](http://www.ualberta.ca/~studentgroupname) URL, you can sign up for a group CCID ([studentgroupname@ualberta.ca](mailto:studentgroupname@ualberta.ca)), and you can also get a Listserv for sending out emails to everyone in your group (perfect for larger groups!). Just visit AICT on the 3rd floor of the General Services Building on North Campus, and then get SGS to sign and verify your group’s registration.

## Professional Development

Throughout the school year, SGS provides professional development sessions on individual topics. These sessions are usually between one to two hours long. Topics include event planning, budgeting and finance, effective fundraising, and more. We're looking at focusing a lot on the effective use of a social media and marketing plan this year—so please email [clubs@su.ualberta.ca](mailto:clubs@su.ualberta.ca) if that is a program you'd be interested in. If you have any suggestions for something that your group would love to learn and just doesn't have the time to research, also—let us know! We'd be more than happy to tailor our schedule to your group's needs. Keep an eye on our website, and we'll keep you posted on other group events, any high-profile speakers, any event series, and much more. ❖

## Advertising on Campus

**Postering ::** Many locations require prior approval. Check out our website—we have a Postering Handbook!—for the exact specifications & who to talk to. ❖

**The Gateway ::** Our lovely campus newspaper has agreed to give student groups a great discount on advertising rates in the print edition of the Gateway—50% off all ads! Contact [biz@gateway.ualberta.ca](mailto:biz@gateway.ualberta.ca) for more info!

**CJSR ::** If you'd like to advertise an event on the radio, CJSR offers free Public Service Announcements for groups, & has reasonable advertising rates. Contact [ads@cjsr.com](mailto:ads@cjsr.com) for more details.

**SU Marketing ::** Professional graphic design services (trust us, they are incredible at what they do!) are available to student groups at preferential rates through the Students' Union Marketing Department. Contact them through their website at [www.su.ualberta.ca/marketing](http://www.su.ualberta.ca/marketing).

## TIPS & TRICKS

- ▶ Print your posters at SUBprint and use your Executive VIP Card to get a discount.
- ▶ SUBtitles and the U of A Bookstore are the only places you can order t-shirts from if you want the U of A logo on them. Visit SUBtitles on the main floor of SUB – registered student groups get good deals!
- ▶ Posters are not the only option for advertising. You can also make t-shirts (SUBtitles), buttons (APIRG), host public awareness events, or theme a group website (AICT) to spread the word!
- ▶ If you'd like a professional design for your posters, the SU Marketing Department is available for a fee. Or talk to the Student Design Association and see if they can help. Sometimes you can strike up great professional relationships with other groups that will set your group up for lasting success.

## **D :: EVENT PLANNING**

Event planning is integral to student group operations—at the very least, you need to be able to plan a successful AGM, but you'll likely also want to provide your group with some socializing or promotional activities, as well as chances to develop new skills, make new friends, raise some money, have some fun... and SGS can help!

In general, it is never a bad idea to get in touch with SGS to check the potential risks of your event and to ensure the proper precautions are taken. Below, we'll briefly address alcoholic events and events with travel, but those are definitely not the only risks—physical activity is a huge source of risk, as are the financial and reputational risks to your group should anything happen during your event. Not to mention the liability you individually would face if anything happened during the event and it were taken to court. We have tons of resources on our website to help you navigate the complex world of student group events—but even if your event is completely safe and low-key, we can still help you with the logistics, budgeting, and planning aspects. Every event is different, but if you talk to SGS, we can help you create a custom plan.

### **Starting Off**

#### *Brainstorm Ideas*

- :: Set clear goals about what you aim to accomplish with the event.
- :: Ideally, how many people would you like to attend? What do you want them to gain? Is it an educational event? A fundraiser? A social event with punch?
- :: Use your imagination & have fun at this stage! Be creative!

#### *Event Plan*

- :: Okay. Back to reality. This is the time to decide exactly what the event is going to look like, once you've had a chance to consider the many options that you've brainstormed.
- :: Consider your venue, what type of food and beverage you would like, how many people will be in attendance, the schedule for the event, and the overall event features.
- :: There are plenty of resources on our website that will help you with these details. ❖

#### *Event Budget*

- :: What can you actually afford to do?
- :: On our website, check out our fundraising tips as well as our magnificent event budget template that will make you cry less at this stage of the event planning process. ❖
- :: Input your estimated costs for the details you have already planned, such as venue and food costs, & then hammer out the details in the next stage...

:: If you need help finding resources, budgeting, or booking venues get in contact with SGS at [clubs@su.ualberta.ca](mailto:clubs@su.ualberta.ca) or 780.492.9789.

### *Logistics*

- :: This is the wonderful part of your life: plan out a detailed timeline, work on your marketing and promotions, recruit and train volunteers, ensure that you are following all the University's policies and procedures, and iron out any details that arise in regards to your event.
- :: This is also when you'll need to book your venue, any presentation speakers, and catering.
- :: Be sure to look for new event resources coming soon to the SGS website—they might help you turn your plans into reality! ❖

### **Alcohol**

If your group plans on holding an event that involves alcohol, there are certain steps you must take.

#### ***Pub-crawls & Other High-Risk Alcoholic Events***

Pub-crawls and drink-a-small-town-dry events are no longer sanctioned on the University of Alberta campus. Your group should not be organizing, promoting, or affiliating with these events as a registered student group on campus. If you have any questions about a specific event, alternatives to your plans, or the policy itself, please contact Lana Cuthbertson, the Student Event Risk Management Coordinator, at [lane.cuthbertson@ualberta.ca](mailto:lane.cuthbertson@ualberta.ca).

#### ***Alcoholic Events***

For all alcoholic events hosted, run, or affiliated with student groups, you'll want to start with the **Student Group Alcohol Event Application** on the SGS BearsDen page, ([www.su.ualberta.ca/services/studentgroups/eventplanning/alcohol](http://www.su.ualberta.ca/services/studentgroups/eventplanning/alcohol)). This form will be submitted to the Student Event Risk Management Coordinator for review. If you have questions about this form, you can contact our office or Lana. Please note that if you are filling out this form later than **14 days** prior to your event, you could be assessed a late fee for rush processing—and this could impact how your event goes forward.

We recommend you talk to SGS or the SERM Coordinator first about your event so we can help you understand exactly what you need to do for your specific event. You can contact the SERM Coordinator, to get the process started and to get more information, at [lane.cuthbertson@ualberta.ca](mailto:lane.cuthbertson@ualberta.ca).

#### ***Waivers & Disclaimers***

By filling out the **Student Group Alcohol Event Application**, you're submitting all the information you need to have waivers or disclaimers created for an event where necessary. Insurance & Risk Assessment will review this information and once your application has been approved, you'll also receive any waivers or disclaimers you need.

### ***Event Organizer Training (formerly Alcohol Awareness)***

Event Organizer Training is hosted by the Student Event Risk Management Coordinator, and is a revised and updated version of the Alcohol Awareness Seminars formerly planned by SGS. This training session will run 3 hours and cover all sorts of risky scenarios and logistical pitfalls, to make sure that your group doesn't have any surprises in store when it comes to your next event! Free access to ProServe is available for all EOT participants, and participants are asked to complete ProServe prior to attending their session. Visit the SGS website for specific dates, times, and locations. EOT is valid for one year, and sessions are hosted in August, September, October, January, February, March, and May.

**If you are planning any kind of event with alcohol, at least two of your executive members MUST have this training. ❖**

### ***ProServe, Security, and Security Identifiers***

If your group is serving alcohol or is responsible for security at your event, your security volunteers will require ProServe training. ProServe is an online program offered by the Alberta Gaming & Liquor Commission, and student group members get free access to it. It is also a mandatory part of Event Organizer Training (see above!). SIPS is offered by **University of Alberta Protective Services**, and group members with valid SIPS training can also serve as security or servers.

Once the event exceeds 300 people, you will be required to contact University of Alberta Protective Services to provide a liaison—ask SGS to find out how to do this.

All security, door staff, and Social Conveners are required to wear security identifiers throughout the course of their shifts. Security identifiers are armbands or t-shirts that must be rented for each alcoholic event. Armbands are for more formal events, while shirts are for less formal events. Groups can only rent one or the other, not a combination of both. They are available at the InfoLink Main Desk in the lower level of SUB.

### ***Purchasing Alcohol***

Alcohol for on-campus events must be purchased through Room at the Top (RATT), Aramark, or Campus St Jean. More details are available on our website or by visiting the suppliers' respective websites.

### ***Alcohol Policy Review Committee Proposals***

If your event qualifies as a Major Event—that is, it's expecting over 300 people or being held outside—your group needs to submit a proposal to the Alcohol Policy Review Committee!

The Alcohol Policy Review Committee (APRC) reports to the Executive Director of Ancillary Services and makes recommendations on all matters

related to the administration of the University's various liquor licenses, the sale or provision of alcohol on campus, and associated safety and risk management issues. APRC reviews proposals from student groups to make sure that they don't violate the terms of University liquor licenses or policies—and to help with the higher demands of risk management.

APRC meets several times a year, but your proposal will have to be in at least one month before your event is held. Check with SGS to get the details on creating and presenting a proposal to APRC! The SERM Coordinator can give you a proposal template to put together.

### **Travel**

The University of Alberta has an **Off-Campus Activity and Travel Policy**, linked on the SGS website and BearsDen page. ❖❖ What's important about it? Well, any travel outside of Edmonton that student groups are undertaking **NEEDS TO BE APPROVED**.

To have your travel activities approved, you must fill out the **Travel Approval Form** on the Student Group Services BearsDen page. ♦ Every trip or event needs to have a separate form filled out.

For information on the Travel Policy, approval, or process, please contact Lana Cuthbertson, Student Event Risk Management Coordinator, at [lanacuthbertson@ualberta.ca](mailto:lanacuthbertson@ualberta.ca) or by phone at 780.492.1396.

### **TIPS & TRICKS**

- ▶ SGS and the SU Venues & Programming Departments are really supportive of student group events. Please don't hesitate to contact us at any of these stages - we'll do whatever we can to help with your event and get you in touch with the right people! And of course, attending the Leadership Summit and the Professional Development series over the year will help you exponentially with your event planning skills.
- ▶ InfoLink can hand out tickets to your event or even collect entries for the contest you're holding. They will require a few days to distribute tickets to their locations, and money cannot be picked up until after the event. Be sure to contact them in advance at 780.492.4212 or at [infolink@su.ualberta.ca](mailto:infolink@su.ualberta.ca).
- ▶ In January, SGS releases applications for Student Group Awards, to be presented at the Students' Union Awards Night in March. The categories include Best Event, Student Group of the Year, Community Outreach, and more. Groups will receive an engraved trophy & a nameplate on the awards displayed in the SGS lounge, as well as other prizes. So pump up that event!
- ▶ Most importantly, if you have any questions or need help with absolutely anything, please ask! We are here to provide as much help as we possibly can, and that includes making changes to help serve you better if you have any suggestions for improvements.



## 3 :: *Practical Resources*

### A :: RECRUITMENT & TRANSITION

For your group's recruitment at the beginning of each term, be sure to take advantage of Clubs Fair. This is a great opportunity to meet people who are interested in getting involved on campus. Clubs Fair is one of the most useful resources SGS offers, as it is where the bulk of member recruitment is done. Also, don't be afraid to put up posters advertising executive positions, or to direct people to your group's meetings (make sure it is obvious that newcomers are welcome, as University can be intimidating sometimes!).

#### **Clubs Fair**

During the Week of Welcome (first week of classes) of the Fall term, Clubs Fair is held in the Butterdome and in Quad as a recruitment and marketing tool for student groups. Promote yourself to campus, and recruit some amazing new members for your team! You must be a fully registered group to participate. Clubs Fair is September 2 to 6 this year, and we'll have some awesome treats in Quad for the first days of classes!

#### **Transition Workshops**

If there is one thing that your group wants to rock at—it's transition. Transition can make or break a group's future, and if you don't put any time or effort into it, you've can effectively sabotage all the work you and your executive have put in over the year. To help guide you through transition processes, SGS is in the process of developing a new and quick Transition Workshop. We are hoping to hold three Transition Workshops over the year, so you can pick the one that best suits your group's timelines. SGS will sit down with groups to show you how to create a transition plan, how to write your own transition manual, how to facilitate transition activities and exercises—and we'll even run over some general goal-setting and skill-development plans that we can customize to your group! To find out more and sign up, keep an eye on the SGS website. ❖

Want a preview? Year-End Reports are incredibly valuable for groups to maintain strong transitions. A Year-End Report could include, but isn't limited to:

- :: instructions for your groups activities over the past year
- :: challenges you've faced and new ones you anticipate
- :: recommendations you would make for the incoming executive
- :: any contact info that was important to you
- :: the location of any club materials
- :: club bank account information
- :: re-registration information (ask SGS!)
- :: any resources that you found helpful
- :: your most recent constitution

- :: the past year's meeting minutes
- :: former year-end reports

Make sure you set aside transition time right when elections happen so that nothing gets left out!

### Other Opportunities

SGS has been working at refining programming and opportunities for this upcoming year, and we have got a lot of great things in the works that you won't want to miss!

- :: Want to work on your event planning skills? We may have a multi-day event conference in March for student groups to access!
- :: Want to learn from the best? We're working on a great new speaker series with InfoLink!
- :: Want to get more publicity? We'll make sure that you have more advertising and tabling opportunities than ever before!

If there's something your group wants, as always—let us know. Or if you have a great idea and need more support, we're here for that too!

### B :: BOOKING SPACE

Booking classrooms & outdoor space is free to Student Group Executives; however, there is a cost to access Smart Classroom equipment (\$25/hr for registered student groups). SUB venues also charge student groups, at a discounted rate.

#### Tabling

Booking classrooms & outdoor space is free to Student Group Executives; however, SUB venues charge student groups, at a discounted rate.

TABLING CONTACTS	
CAB	Bookings made in person and must fill out a form 780-492-5221   Exams & Timetabling
HUB	780.492.2241   HUB Property Management Services 25\$ per day +GST to table
SUB	SUB Main Office (2-900) Must fill out form in person first and may take up to 3 business days to process. Can book tables after form has been approved
ECHA	echa.admin@ualberta.ca   ECHA Administration
ETLC	780.492.1385   Connor Harper will only book tables for Faculty of Engineering affiliate groups
Education	vp.internal@educationstudents.ca   780.492.3650 Education Students' Association does not allow bake sales, hiring or soliciting

Business/Tory Galleria	Bookings made in person and must fill out a form 780.492.5221   Exams & Timetabling
Chemistry	laura.pham@ualberta.ca   Laura Pham
Outdoor Space	Facilities & Operations <a href="http://www.facilities.ualberta.ca/en/Operations_Maintenance_FO/BGS/Site_Bookings.aspx">http://www.facilities.ualberta.ca/en/Operations_Maintenance_FO/BGS/Site_Bookings.aspx</a>

## CLASSROOMS

Classrooms, Lecture Halls, Atriums (indoor space)	rocentralbooking@ualberta.ca Exams & Timetabling
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## VENUES

Alumni House	780.492.6057   Conference Services conference.services@ualberta.ca
Lister Centre	780.492.6057   Conference Services conference.services@ualberta.ca
Alumni Room (SUB)	SUB Main Office, 2-900 (All bookings made in person)
Dewey's	deweys@su.ualberta.ca (cost varies depending on needs)
Dinwoodie Lounge ❖	780.492.2048   Kristen Ostrowski dinwoodie@su.ualberta.ca
Myer Horowitz Theatre ❖	780.492.4764   Kristen Ostrowski theatre@su.ualberta.ca

For even more specific space-booking information visit our Bookings & Student Group Perks and Resources & Downloads pages on our website. ❖

## C :: OFFICES, LOCKERS, MAILBOXES, & EQUIPMENT

### SUB Offices, Lockers & Mailboxes

SUB is going through a makeover! Due to the renovations taking place, we cannot offer student groups office spaces, lockers or mailboxes this year. Once renovations are done, we will be offering new and improved office spaces again. Keep updated on renovations through the SU website! ❖

### Mail

If your group requires a mailing address, please use the address listed below:

Your Group Name Here  
c/o Student Group Services  
0-22 SUB  
8900-114th Street  
Edmonton, AB T6G 2J7

We will send an email to the primary contact to let them know your group's mail has been received and that your group can pick it up from our office in

o-22 SUB during our office hours. If mail is not picked up within one month, it will be returned to sender.

## **SGS Rentals**

### *Projectors & Tables & Flipchart*

SGS lends out projectors, a projector screen, cashbox, first aid kits, and candle votive centrepieces to student groups, for use only on campus. There is no rental fee, but deposits are required to safeguard against damage & late returns. Your group can keep a deposit on file with SGS throughout the year, if you'll be using our equipment often! In addition, an equipment usage contract must be signed when picking up the rentals. They can be booked in person, over the phone, or by e-mailing [clubs@su.ualberta.ca](mailto:clubs@su.ualberta.ca).

### *Costco Membership Card*

Through the Students' Union, SGS lends out a Costco Membership Card that allows student groups to save money on food for their events & various other things. If you remember to go on a sample day, you may even get a free dinner out of it! There is no rental fee on the card, but there is a \$100 deposit to ensure the card is returned.

:: **IMPORTANT:** Costco does not accept a credit card as payment, so make sure you have cash if you're going. The membership card can't be kept for longer than 24 hours, and we need to have at least 24 hours notice to make sure the card is available.

### *Other Equipment*

We have an equipment bank on our website where other student groups can list equipment they are renting out. The rates and contact information are all listed there. SGS is also looking to expand our rental resources—so if there's something your group really needs on occasion (or can't afford to buy, but would love to rent) let us know at [clubs@su.ualberta.ca](mailto:clubs@su.ualberta.ca).

## **Executive VIP Card**

As a registered student group, you get access to the SGS Executive VIP Card! Each group gets two cards to share amongst the executive members, and they're good for discounts at SUB businesses and venues, as well as a host of others! The 2013 - 2014 VIP Cards was released mid-September—drop by anytime during our office hours and we can get you yours.

A full list of discounts is available on our website. ❖

## **D :: GRANTING**

The Student Group Granting Committee administers grants for all student groups. Both the Students' Union and the Office of the Dean of Students provide funds that add up to about \$100,000 in grants given out over the year.

We **strongly** recommend that your group complete your application one week before the deadline, then make an appointment with Student Group Services to review it & gain suggestions for improvements – the most common reason that groups do not get grant money is due to poor or incomplete applications.

Keep an eye out for Granting Information Sessions prior to each deadline, and visit our website for the application form, guidelines, & plenty of advice. If you're in a time-crunch with your grant application, at the very least read through all the tips & guidelines on the website. When making a grant application review appointment, make sure you have all your materials with you. The more responsible you show you are with money, the better chance you stand of receiving some. After a granting session is complete, you can go over your application with SGS to figure out why you received, or did not receive, grant money. .

### **Leadership Summit**

If you have two executive members attend the full Leadership Summit in September, your group will be able to get up to \$5000 worth of funding from the Student Group Granting Committee! Otherwise, you're still eligible for up to \$2500! Check with SGS if you aren't sure where your group's standing.

### **Granting Information Sessions, Deadlines and Information ❖**

The granting information sessions provide helpful advice for groups who are applying for grants. We'll tell you what the committee is looking for and the type of things to avoid! Definitely check it out if you are applying for grants – it could make a huge difference!

There will be five granting information sessions scheduled per year, (generally a week before the granting deadline) and they will run from 5-6 pm on the following days in CAB 273::

- :: Monday, July 8, 2013
- :: Monday, September 9, 2013
- :: Wednesday, November 13, 2013
- :: Monday, January 6, 2014
- :: Monday, March 3, 2014

There are five granting sessions per year, and the deadlines to apply are **11:59 pm** on the following days:

- :: Monday July 15, 2013
- :: Monday September 16, 2013
- :: Monday November 18, 2013
- :: Monday January 13, 2014

:: Monday March 10, 2014

There are three different granting categories: the Start Up Grant, the Activity Grant, and the Conference Grant.

:: Start Up Grant: Only available to groups in their first or second year of operation, and the groups must be registered with the Students' Union as well as the University of Alberta. Up to \$750.00 for basic supplies and costs.

:: Activity Grant: Up to 50% of an activity's costs; the activity can be a one-time event or a recurring series. Activities must occur after the granting deadline, and groups can even have a joint grant application if the activity is a collaboration. (Common downfall: Fundraising activities are not eligible for any granting money.)

:: Conference Grant: Up to 50% of a conference's costs. If your members are going to a competition, conference, tournament, or any kind of external event as representatives of your group, you can apply for a conference grant!

### **AND FINALLY...**

Let us know what we can do to help you throughout the year! You can contact any of us at the below information, and keep an eye on our calendar. As helpful as we like to be, it's up to you to ASK for that help, and to keep yourself informed of our deadlines, dates, and requirements.

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### **Student Group Services**

**Office 0-22 SUB**

**SGS Main Contact Info** (Administrative Assistants)

E :: [clubs@su.ualberta.ca](mailto:clubs@su.ualberta.ca)

P :: 780.492.9789

**Kaz Haykowsky**, Coordinator

E :: [sgcoordinator@su.ualberta.ca](mailto:sgcoordinator@su.ualberta.ca)

**Eric Kother**, Coordinator

E :: [co.clubs@su.ualberta.ca](mailto:co.clubs@su.ualberta.ca)

**Chelsea Livingstone**, Manager

E :: [sgsmanager@su.ualberta.ca](mailto:sgsmanager@su.ualberta.ca)

P :: 780.492.2390

Contact Us: Resources & Handbooks, Contests, Website Support & Updates,  
Registration, General Inquiries

**Do you have a more specific question?**

Kaz's main projects include: Student Group Offices, Granting, Clubs Fair, and Student Group Executive Consultation Committee (SGECC).

Eric's main projects include: Leadership Summit, Professional Development, the Promotions and Leadership Street Team (PALS), and Promotions.

Chelsea can help with anything—start with her for procedure/policy questions or troubleshooting.

Do you have questions about events or Event Organizer Training?

Contact Lana Cuthbertson at [lana.cuthbertson@ualberta.ca](mailto: lana.cuthbertson@ualberta.ca) with your event proposal!

*“Leaders aren't born, they are made. And they are made just like anything else through hardwork. And that's the price we'll have to pay to achieve that goal, or any goal”*

—Vince Lombardi

*“Do not follow where the path may lead. Go instead where there is no path and leave a trail.”*

—Ralph Waldo Emerson

*“A good objective of leadership is to help those who are doing poorly to do well and to help those who are doing well to do even better.”*

—Jim Rohn

## **STUDENT GROUP SERVICES**

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Students' Union Building  
University of Alberta  
Edmonton, Alberta, Canada  
T6G 2J7

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780-492-9789

[clubs@su.ualberta.ca](mailto:clubs@su.ualberta.ca)

[www.su.ualberta.ca/studentgroups](http://www.su.ualberta.ca/studentgroups)

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