Faculty and Campus Association

TRANSITION SURVIVAL KIT
Transition Survival Kit

You’ve just entered into a representative role for which you’ve received little or no training or transition and you don’t know what you’re doing. Now what?

5 Things You Should Do at the Beginning of Your Term

1st Thing: read your bylaws/constitution. This document should be in your office in a hard copy, and probably a digital copy on the office computer. If you can’t find it there, check your group’s website or Bearsden. Worst comes to worst, Discover Governance keeps copies of all FA constitutions.

Ideally, you will read the entirety of your bylaws/constitution. However, if you are finding the thought of this intimidating, look at the part of the bylaw that deals with your portfolio first. After that, take a look at the section dealing with all members and executives/directors, and their duties. Finally, take a look at any section that seems to relate directly to your portfolio’s description. For example, if your portfolio’s description lists dealing with finances as one of your duties, you might want to read the sections of bylaw dedicated to finances.

2nd Thing: From this information, make a list of everything you are expected to do in your position and briefly think about or even write down how you will go about fulfilling those expectations. If you are unsure of how to do this or where to start, pick one of the aspects of running a faculty association in the attached flow charts and go through the steps of preparing for the upcoming year.

3rd Thing: Do the previous two things, but this time with your policy manual. Keep in mind that policy manuals tend to be longer and more detailed, but do not need to be followed as closely. Bylaw must be adhered to at all times, but policy is a little easier to adapt where necessary. It is more of a general guideline for how everyday business should be conducted than a strict law. If you are ever unsure about how to deal with a piece of everyday business, such as making a bank deposit, check your policy manual first.

4th Thing: Meet with your executives to talk about your role and theirs, what is expected throughout the year, what kinds of goals you want to work towards, etc. Make sure everyone on the board is clear about your organizational goals for the year and how you intend to achieve them.

5th thing: Create your own set of goals and expectations you have in your position, making sure they align more or less with the goals and expectations of the entire board, and write out a plan of how you intend to meet those goals and expectations. Consider including in your plan the stuff you came up with when thinking about how you will fulfill the duties of your position. This strategic plan can help you organize your year of involvement in advance so that there are no surprises about how much time you will have to spend on the FA or when you will have to spend it.

Now you’re ready to make the most of your representative role over the next year!
How to use these flowcharts

It's pretty simple! Pick a chart that is relevant to your position. Starting at the top of the chart, answer the questions and follow the arrows until you’re finished. Mark down sections that are relevant to you and make note of resources or contacts you need to track down.

This resource is not meant to tell you exactly how to do everything you need to do, but rather to help you figure out the major things that need to be done and where to find the resources to do them right. It is unlikely to include everything that is listed under your portfolio or member duties in your constitution; it is meant to draw your attention to the bare minimum of things you need to get done to keep your organization functioning, without dumping you with information or making you read through things that might be relevant to some FAs but not others. Be sure you know and understand all duties listed under the portfolio and member sections of your constitution that are relevant to you.

Glossary of terms

For the sake of being concise and saving space, a lot of acronyms and terms are used without very much explanation. Here is a list of the terms and acronyms first time representatives might not understand, and what they mean.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>AICT</td>
<td>Academic Information and Communication Technologies. They are responsible for all technology on campus. <a href="http://www.aict.ualberta.ca/">http://www.aict.ualberta.ca/</a></td>
</tr>
<tr>
<td>Bylaws</td>
<td>Rules by which your organization operates. They are sometimes combined with the constitution into one document, which might be called the bylaws or the constitution interchangeably.</td>
</tr>
<tr>
<td>COFA</td>
<td>Council of Faculty Associations. An advisory body to the Students’ Union, it is chaired by the SU Vice President Academic, and its membership consists of directors or executives from each faculty association.</td>
</tr>
<tr>
<td>Constitution</td>
<td>Defines what your organization is and why it exists. It is sometimes combined with the bylaws into one document, which might be called the bylaws or the constitution interchangeably.</td>
</tr>
<tr>
<td>External to faculty</td>
<td>Anyone that is not your membership or faculty administration. This could mean the central administration of the University of Alberta, government departments or groups, professional associations, lobby groups, etc.</td>
</tr>
<tr>
<td>External to membership</td>
<td>Anyone who is not the students your FA represents.</td>
</tr>
<tr>
<td>FA Membership</td>
<td>Defined in your constitution/bylaws. Usually consists of all undergraduate students, or all fee-paying undergraduate students, in your faculty.</td>
</tr>
<tr>
<td>Funds</td>
<td>All money, either in cash, cheque, or in your group’s bank account</td>
</tr>
<tr>
<td>General Meeting</td>
<td>A meeting of your entire membership., usually called to hold elections or to pass budgets or bylaw amendments. Must happen at least once per year.</td>
</tr>
<tr>
<td>Policy Manual</td>
<td>A broad overview of your organization’s standard operating policies and procedures.</td>
</tr>
<tr>
<td>Populating Committees</td>
<td>Finding people to fill committee seats, and then officially appointing them.</td>
</tr>
</tbody>
</table>
Administration

Are you responsible for general meetings?

Do you know what to do?

Yes

No

Not sure

Check your bylaws and policy manual

Good!

Do you chair any committees or other meetings?

Yes

Not sure

No

Check your bylaws
Discuss with your exec
Then don’t worry about it!

Do you know how to chair a meeting?

No

Yes

Contact Discover Governance
Find Discover Governance resources online
Get advice from COFA

Are you responsible for populating councils or committees for your organization or faculty?

Then don’t worry about it!

No

Yes

Do you know what to do?

Are you responsible for communicating with your organization’s membership?

No

Yes

Then don’t worry about it!

Great!

Discuss with your volunteer coordinator
Get advice from SGS
Get advice from COFA
See the Volunteer Coordinator section of the transition survival kit

See the Communication section of the transition survival kit

You are now ready to start the year!

Check your bylaws and policy manual
Check Students’ Union bylaw 8100
Contact Discover Governance
Communication with Membership

Are you responsible for general meetings?
- Yes
  - Do you know what to do?
    - Yes
      - Check your bylaws and policy manual
    - Not sure
      - Check your bylaws and policy manual
  - No
    - Then don’t worry about it!

Do you have a mailing list for your membership?
- Yes
  - Great start!
- Not sure
  - Contact your faculty
- No
  - Contact AICT

Are you connected with any social media? (Facebook, Twitter, etc)
- No
  - Get on it!
- Yes
  - Do you have access to your website?
    - No
      - Contact the web host
      - Make sure your constitution, meeting minutes, meeting agendas, and contact info are on it.
    - Yes
      - We don’t have a website
        - Get on it!
      - Yes
        - Contact the web host
        - Make sure your constitution, meeting minutes, meeting agendas, and contact info are on it.

Are you responsible for communicating with Departmental Associations?
- Yes
  - Do you have their contact info?
    - Yes
      - Great!
    - No
      - Then don’t worry about it!
  - No
    - Our faculty doesn’t have any
      - Then don’t worry about it!
    - Not sure
      - Check your bylaws
      - You are now ready to start the year!
    - No
      - Then don’t worry about it!
  - Not sure
    - Check your bylaws
    - You are now ready to start the year!

Check Students’ Union bylaw 8100
Contact Discover Governance
Contact your faculty
Contact SGS
Check Bearsden
If all else fails, Google them
Finances

Are you responsible for general meetings?

Do you know what to do?

Yes

Check your bylaws and policy manual
Check Students’ Union bylaw 8100
Contact Discover Governance

No

Not sure

Check your bylaws and policy manual

No

Then don’t worry about it!

Do you have access to your organization’s bank account?

Good!

Yes

Not sure

No

Contact your bank

Do you know who has signing authority?

No

Contact bank
Check your policy manual
Check your bylaws
Check past bank statements
Discuss with your exec

Yes

Make sure they know about it

Do you know your organization’s rules for handling funds?

Yes

No

Discuss with your exec
Check your bylaws
Check your policy manual
Check SU bylaw 8100

Do you know what your budget is?

No

Consult past budgets
Contact Discover Governance
Check bank account

Yes

Do you know how to prepare an annual budget?

Yes

No

Discuss with your exec
Check your bylaws
Check your policy manual
Look at past budgets
Contact the SUVPA
Contact SGS
Contact your faculty

Check SU bylaw 8100/8200
Contact Discover Governance
Contact the SUVPA

Are you aware of SU reporting requirements?

Yes

You are now ready to start the year!

No

Discuss with your exec
Contact SGS
Contact Discover Governance
Consult past budgets
Programs and Events

Are you responsible for general meetings?

Do you know what to do?

Yes

Not sure

No

Then don’t worry about it!

Check your bylaws and policy manual

Check your bylaws and policy manual

Check Students’ Union bylaw 8100
Contact Discover Governance

Does your organization hold annual events?

Good!

No

Not sure

Yes

Look through old files
Check your bylaws
Contact SGS

Do you have event ideas of your own?

Yes

No

Do you know what to do?

Yes

No

Check your bylaws
Check your policy manual
Contact SGS
Contact Risk Management
Contact your faculty
Ask COFA for advice
Contact your faculty

Do you have a budget?

Yes

Not sure

No

Talk to your finance person

Talk to your exec about reorganizing the budget
Look at fundraising options
Get advice or grants from SGS
Get advice from COFA
Ask faculty about financing events

Is your budget big enough?

No

Yes

You are now ready to start the year!
Volunteer Recruitment/Management

Do you have a database of volunteer contacts?

Yes

This is a good start!

Are you responsible for populating any councils or committees?

No

Not sure

Check your bylaws
Talk with your exec

Then don’t worry about it!

Do you need a volunteer recruitment strategy for upcoming events?

No, we don’t have any events

Do you have a volunteer recruitment strategy?

Yes

Great! You are ready to start the year!

No

Talk with your exec
Get advice from COFA
Get advice from SGS

Do you know what to do?

Yes

Great!

No

Check your bylaws/policy manual
Talk with your exec
Contact the council/committee chairs

Not sure

Check your bylaws
Talk with your exec

Then don’t worry about it!

Create one with Excel or Word
Create volunteer sign-up sheets
Contact AICT to set up a mailing list
Important Contacts

**Students’ Union**
Room 2-900, Students’ Union Building, University of Alberta
8900 – 114 St NW, Edmonton, AB, T6G 2J7
Phone: (780) 492-4236
Website: www.su.ualberta.ca

**VP Academic**
Phone: (780) 492-4236
E-mail: vp.academic@su.ualberta.ca

**Discover Governance**
Room 030N, Students’ Union Building
Phone: (780) 492-6675
Website: www.su.ualberta.ca/governance/discover

**Student Governance Advisor**
E-mail: sga@su.ualberta.ca

**Student Governance Officer**
E-mail: sgo@su.ualberta.ca

**Student Group Services**
Room 040A, Students’ Union Building
Phone: (780) 492-9789
Website: www.su.ualberta.ca/services/studentgroups/
E-mail: clubs@su.ualberta.ca

**Infolink**
Main Office: Room 0-26, Students’ Union Building
Phone: (780) 492-4212
Website: www.su.ualberta.ca/services/infolink/
E-mail: infolink@su.ualberta.ca

**Dean of Students**
Room 5-02, Students’ Union Building
Phone: (780) 492-4145
Website: www.deanofstudents.ualberta.ca
E-mail: dosdean@ualberta.ca

**Risk Management**
1204 College Plaza, 8215 – 112 St, Edmonton, AB, T2G 2C8
Website: www.rms.ualberta.ca

**Manager, Communications and Project Planning**
Andrew Leitch
Phone: (780) 492-8881
E-mail: andrew.leitch@ualberta.ca

**Manager, Insurance and Risk Assessment**
Shannon Boychuk
Phone: (780) 492-8886
E-mail: Shannon.boychuk@ualberta.ca