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>Description</th>
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<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>
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<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>
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<tr>
<td>Funds</td>
<td>All money, either in cash, cheque, or in your group’s bank account</td>
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<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>
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<tr>
<td>Populating Committees</td>
<td>Finding people to fill committee seats, and then officially appointing them.</td>
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Administration

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

Do you chair any committees or other meetings?

Yes

Not sure

No

Then don’t worry about it!

Check your bylaws

Discuss with your exec

Do you know how to chair a meeting?

Yes

No

No

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?

Yes

Great!

No

Then don’t worry about it!

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

Yes

No

Yes

No

Then don’t worry about it!

Discuss with your volunteer coordinator

Get advice from SGS

Get advice from COFA

See the Volunteer Coordinator section of the transition survival kit

You are now ready to start the year!
External Communications and Advocacy

Do you know your SU point of contact?

- Yes
  - Are you the COFA rep for your organization?
    - Yes
      - Check the COFA Wiki
      - Contact the SUVPA
    - Not sure
      - Check your bylaws
      - Check your policy manual
      - Discuss with your exec
    - No
      - Then don’t worry about it!
- No
  - Contact Discover Governance
  - Contact the SUVPA
  - Check the COFA page on the SU website

Do you meet regularly with anyone from your faculty?

- Yes
  - Set up a meeting
  - Check your bylaws
  - Contact your faculty
- Not sure
  - Decide what to do about it
- No
  - Check with the receptionist in your Dean’s office
  - Check with your Associate Dean of Teaching and Learning (or equivalent)

Do you sit on any faculty committees?

- No
  - Then don’t worry about it!
- Yes
  - Contact your faculty to find out which ones
  - Contact Discover Governance
  - Contact the SUVPA
  - Great! Do it!

Will you be in contact with anyone external to your faculty?

- Yes
  - You are now ready to start the year!
- No
  - Then don’t worry about it!
Finances

Are you responsible for general meetings?

Do you know what to do?

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

Do you know who has signing authority?

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

Do you know your budget is?

Do you know how to prepare an annual budget?

Are you aware of SU reporting requirements?

You are now ready to start the year!
Programs and Events

Are you responsible for general meetings?

Do you know what to do?

Yes

No

Not sure

Check your bylaws and policy manual

Does your organization hold annual events?

No

Not sure

Yes

Check your bylaws

Check Students’ Union bylaw 8100

Contact Discover Governance

Great!

Contact SGS

Contact Risk Management

Contact your faculty

Get advice from COFA

Do you have event ideas of your own?

Yes

No

Do you know what to do?

Yes

No

Get on it!

Get ideas from:

SGS

COFA

Your membership

Your faculty

Check your bylaws

Check your policy manual

Contact SGS

Contact Risk Management

Ask COFA for advice

Contact your faculty

Is your budget big enough?

No

Yes

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

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

Do you have a database of volunteer contacts?

No
Create one with Excel or Word
Create volunteer sign-up sheets
Contact AICT to set up a mailing list

Yes
This is a good start!

Are you responsible for populating any councils or committees?

Yes

Not sure
Check your bylaws
Talk with your exec

No
Then don't worry about it!

Do you know what to do?

Yes

No
Check your bylaws/policy manual
Talk with your exec
Contact the council/committee chairs

Great!

Do you need a volunteer recruitment strategy for upcoming events?

No, we don't have any events
This is a problem. You should:
Talk with your exec
Contact Discover Governance
Contact the SU VPA

Yes

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