

**Faculty & 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 by-law 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. Bylaws 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.

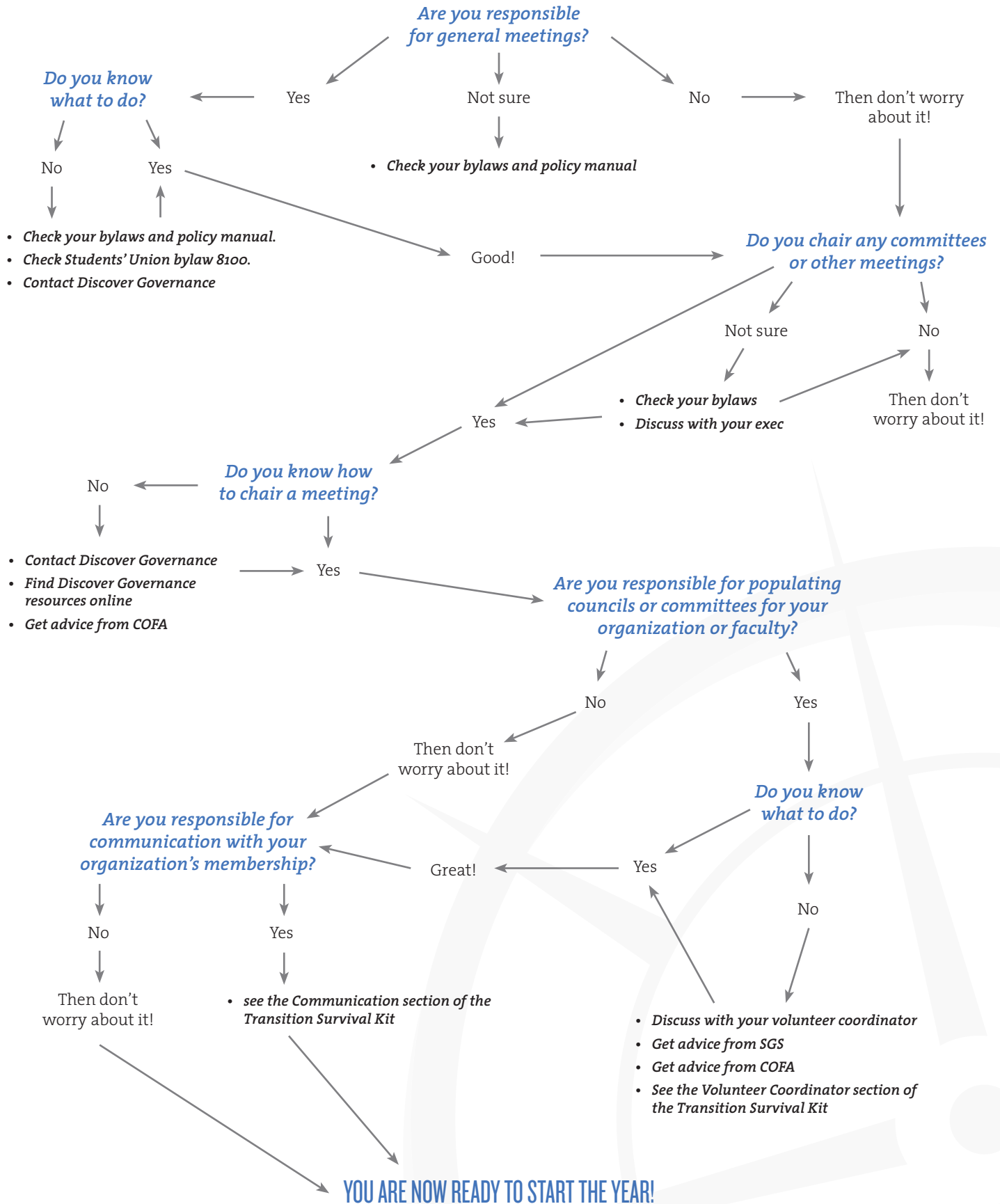
This resource is not meant to tell you exactly how to do everything you need to do, but rather to help you figure out the major things that need to be done and where to find the resources to do them right. It is unlikely to include everything that is listed under your portfolio or all things you need 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

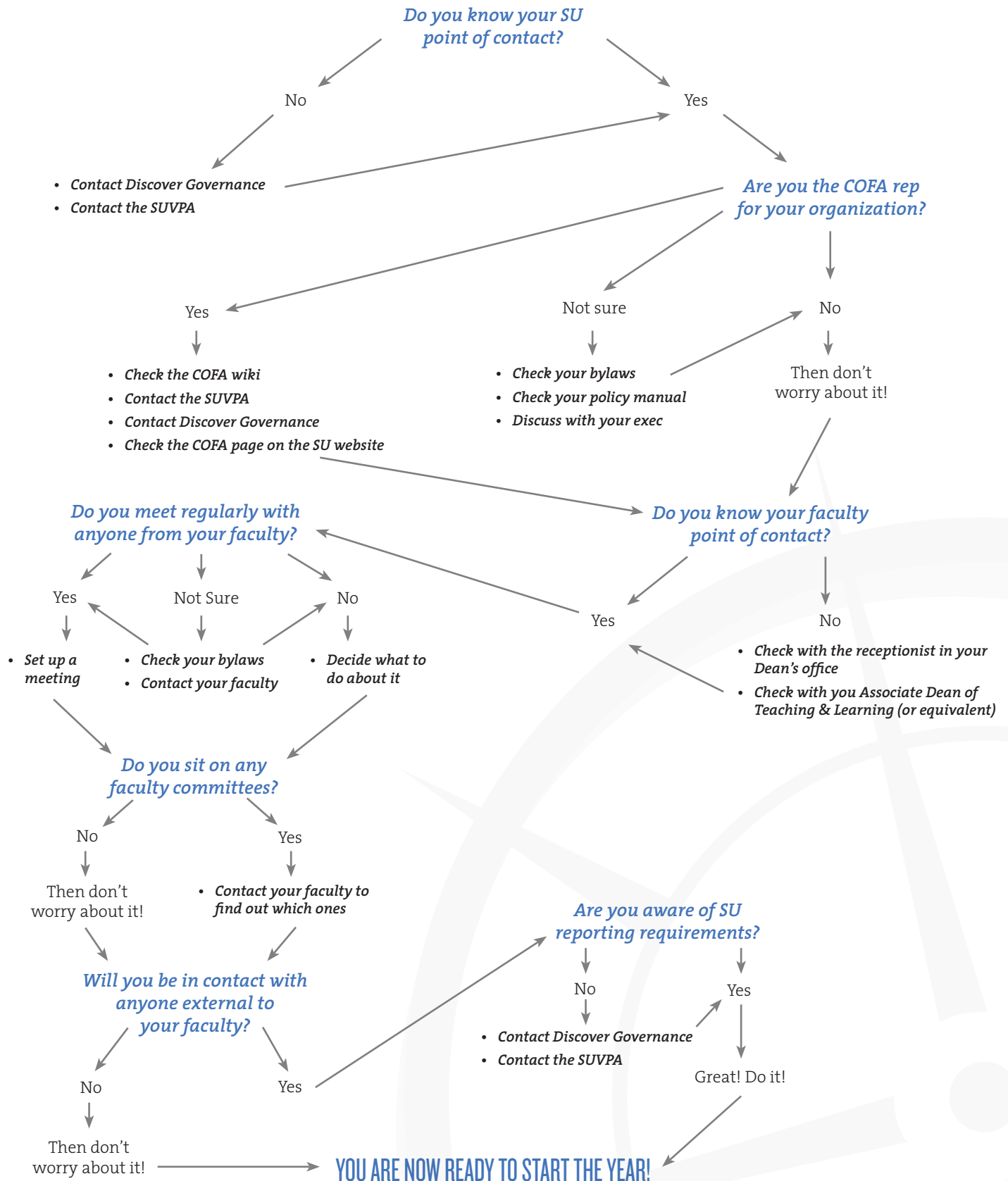
For the sake of being concise and saving space, a lot of acronyms and terms are used without very much explanation. Here is a list of the terms and acronyms first time representatives might not understand, and what they mean.

<b><i>Bylaws</i></b>	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.
<b><i>COFA</i></b>	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.
<b><i>Constitution</i></b>	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.
<b><i>External to Faculty</i></b>	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.
<b><i>External to Membership</i></b>	Anyone who is not the students your FA represents.
<b><i>FA Membership</i></b>	Defined in your constitutions/bylaws. Usually consists of all undergraduate students, or all fee-paying undergraduate students, in your faculty.
<b><i>Funds</i></b>	All money, either in cash, cheque, or in your group's bank account.
<b><i>General Meeting</i></b>	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.
<b><i>IST</i></b>	Academic Information and Communication Technologies. They are responsible for all technology on campus. <a href="http://www.ist.ualberta.ca">www.ist.ualberta.ca</a>
<b><i>Policy Manual</i></b>	A broad overview of your organization's standard operating policies and procedures.
<b><i>Populating Committees</i></b>	Finding people to fill committee seats, and then officially appointing them.

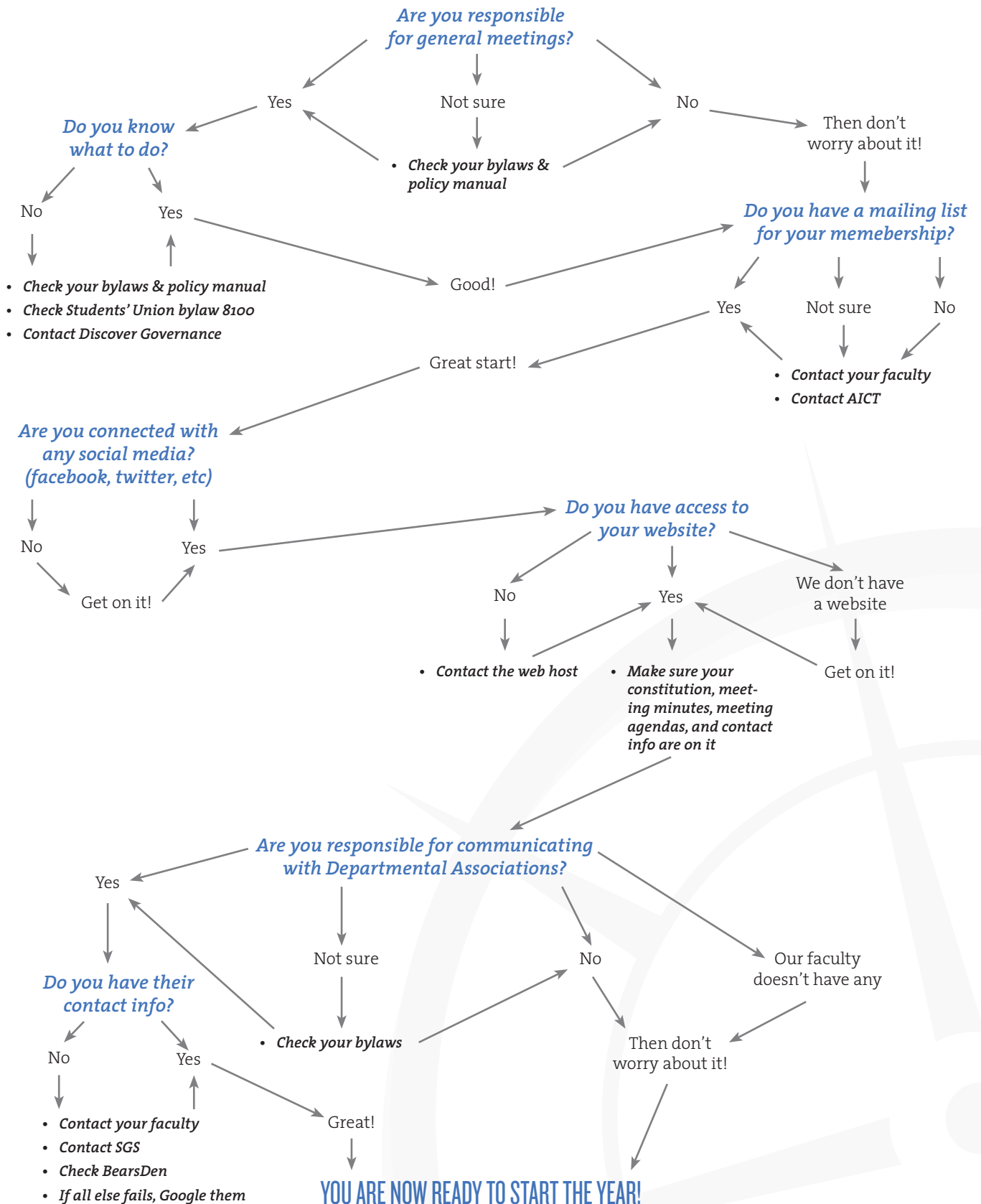
# ADMINISTRATION



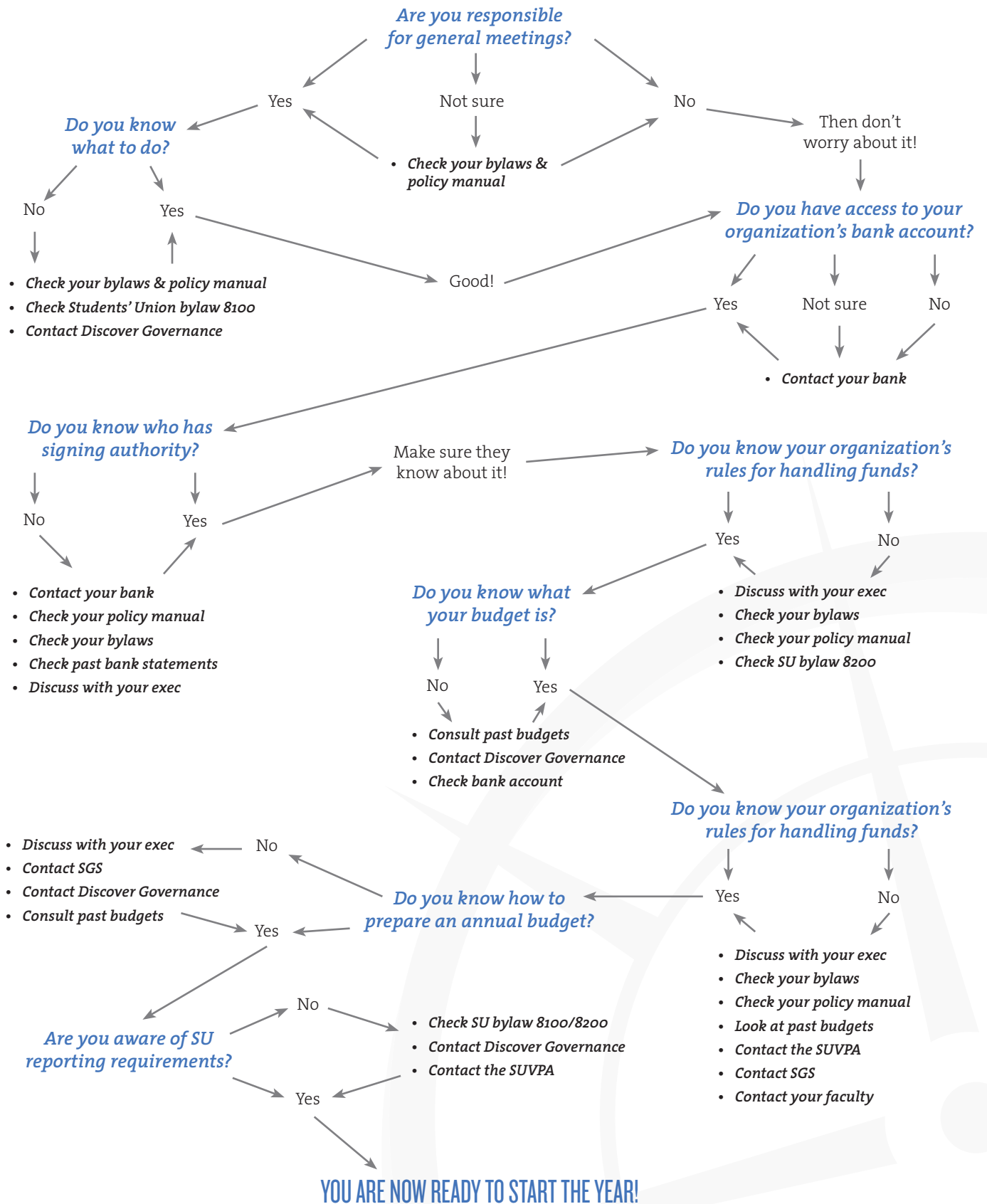
# EXTERNAL COMMUNICATIONS AND ADVOCACY



# COMMUNICATION WITH MEMBERSHIP

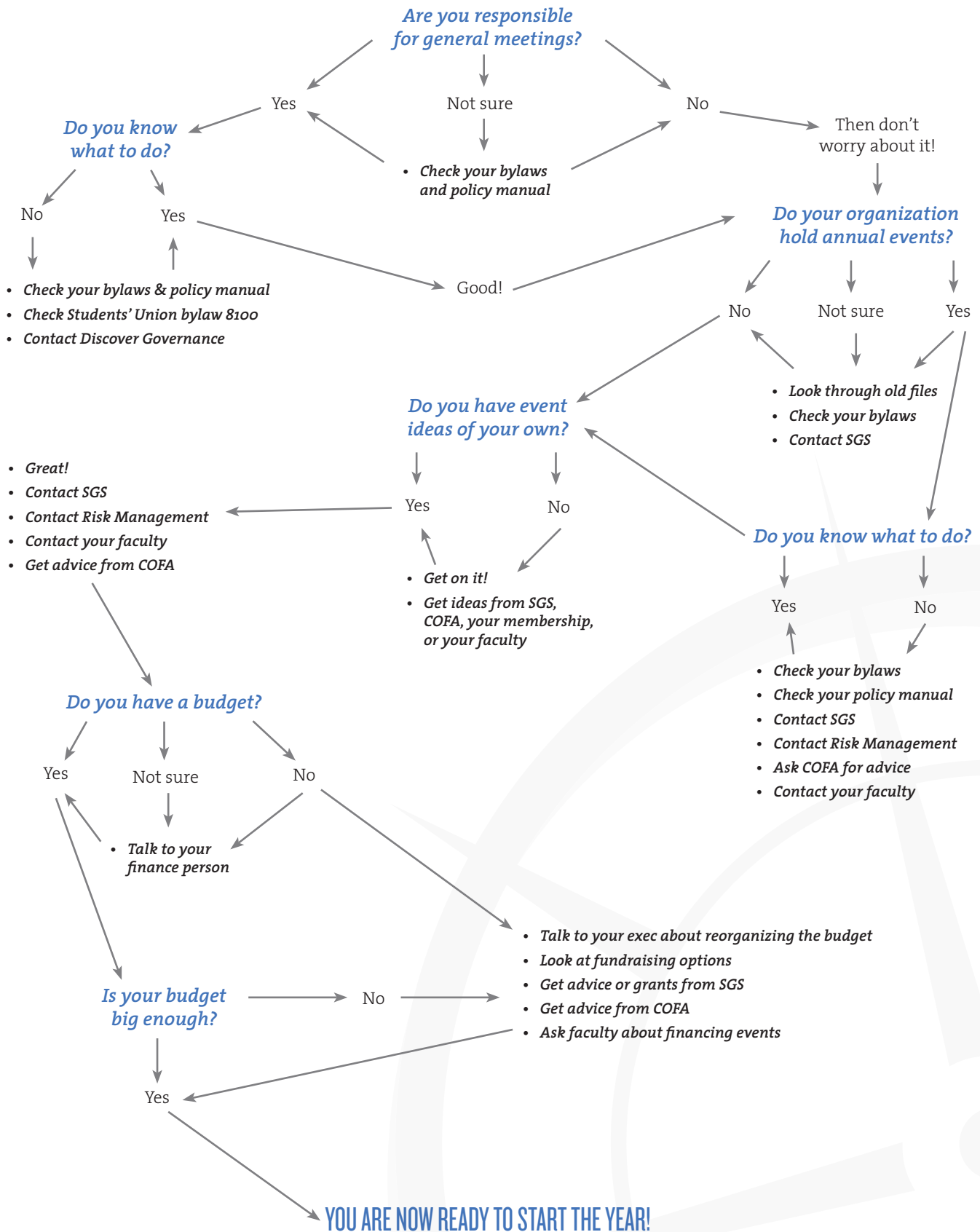


# FINANCES

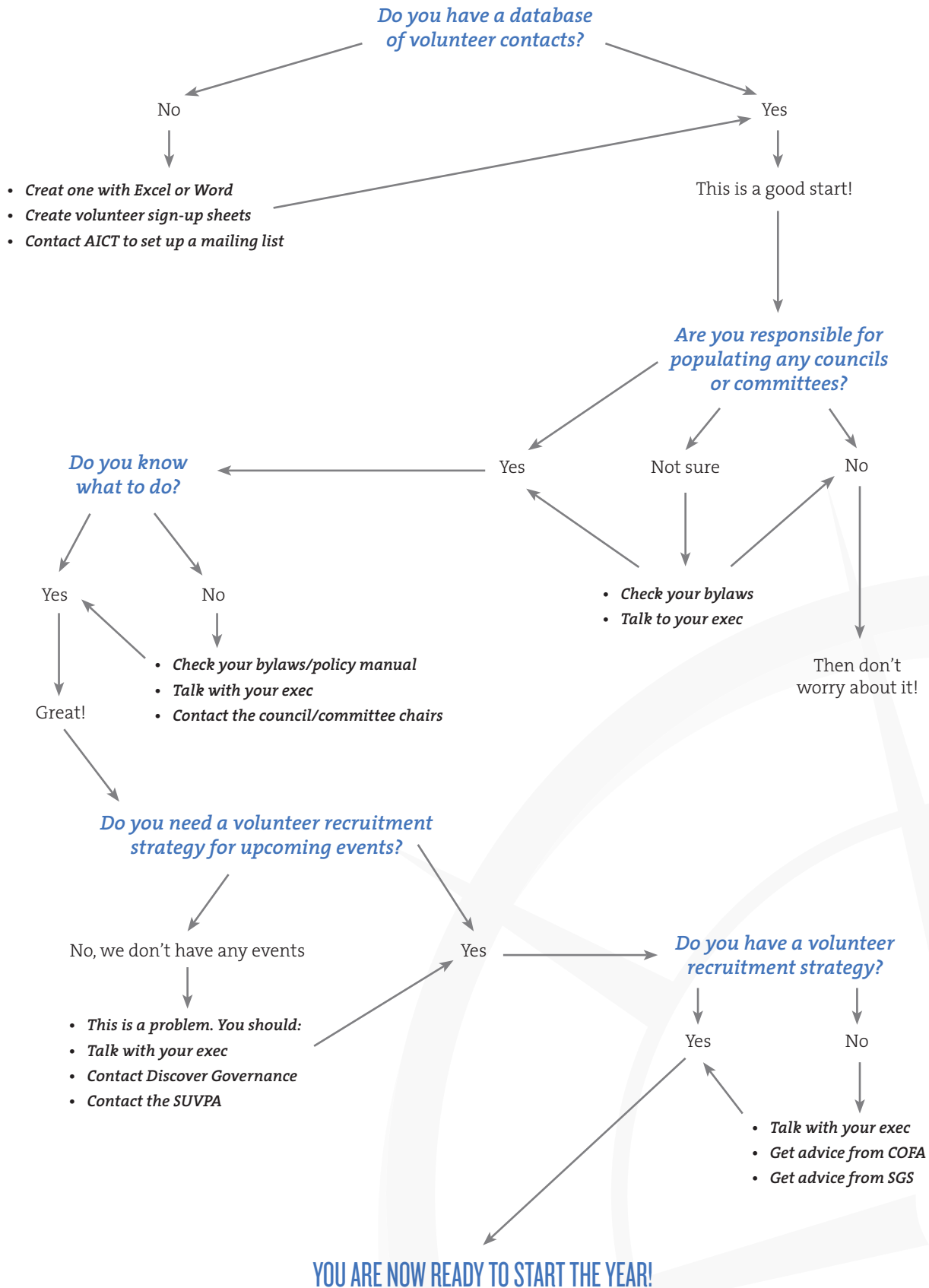




# PROGRAMS AND EVENTS



# VOLUNTEER RECRUITMENT/MANAGEMENT



# 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](http://www.su.ualberta.ca)

### **VP Academic**

Phone: 780-492-4236  
E-mail: [vp.academic@su.ualberta.ca](mailto:vp.academic@su.ualberta.ca)



## **Discover Governance**

Room 6-24, Students' Union Building  
Phone: 780-492-6675  
Website: [www.su.ualberta.ca/governance/discover](http://www.su.ualberta.ca/governance/discover)

### **Discover Governance Manager**

E-mail: [governance@su.ualberta.ca](mailto:governance@su.ualberta.ca)

### **Student Governance Officer**

E-mail: [sgo@su.ualberta.ca](mailto:sgo@su.ualberta.ca)



## **Student Group Services**

Room 040A, Students' Union Building  
Phone: 780-492-9789  
Website: [www.su.ualberta.ca/services/studentgroups/](http://www.su.ualberta.ca/services/studentgroups/)  
E-mail: [clubs@su.ualberta.ca](mailto:clubs@su.ualberta.ca)



## **InfoLink**

Main Office: Room 0-26, Students' Union Building  
Phone: 780-492-4212  
Website: [www.su.ualberta.ca/services/infolink/](http://www.su.ualberta.ca/services/infolink/)  
E-mail: [infolink@su.ualberta.ca](mailto:infolink@su.ualberta.ca)



## **Dean of Students**

Room 5-02, Students' Union Building  
Phone: 780-492-4145  
Website: [www.deanofstudents.ualberta.ca](http://www.deanofstudents.ualberta.ca)  
E-mail: [dosdean@ualberta.ca](mailto:dosdean@ualberta.ca)

## **Risk Management**

1204 College Plaza, 8215 – 112 St., Edmonton, AB, T2G 2C8  
Website: [www.rms.ualberta.ca](http://www.rms.ualberta.ca)  
Manager, Communications and Project Planning

### **Andrew Leitch**

Phone: 780-492-8881  
E-mail: [andrew.leitch@ualberta.ca](mailto:andrew.leitch@ualberta.ca)

### **Manager, Insurance and Risk Assessment**

Murray Middleton  
780-492-8886  
[murray.middleton@ualberta.ca](mailto:murray.middleton@ualberta.ca)