

DSU Society Transition Checklist - Outgoing

Hello there!

If you are reading this, it means your society is going through our yearly transitional process where powers are transferred from a previous executive team to a new one for the new academic year. While each society operates differently and have distinct electoral procedures to be followed, almost all societies share a basis of “what should be covered” during Transition. While this document is not all exhaustive, it should provide you with a rough outline of what things you need to make sure have been accounted for during the Transition process!

I. Unfinished Tasks and Projects

- Any major unfinished tasks should be taken note of.
- Providing your future executives with a timeline and checklist of what needs to be done to have a task completed could help.
- Any budgets, email conversations, minutes, and/or other documents who can help your successors finish their tasks should be left behind.

II. Accounts and Passwords

- If your society has any social media or work accounts, make sure to leave the access information required for the platform. (I.e. usernames, email handles, passwords, etc.)
- If any of the Accounts above need to be renewed, you should probably leave a note of it.

III. Bank Account

- If your society has a Bank Account, make sure that signing authorities are transferred. You want to do this while it is still possible to reach both the old and new executives.
- You can do this by filling out a Bank Letter request, and noting down the change in signatories.
- You can email dsuvpi@dal.ca

IV. Society Timeline

- If your society traditionally follows a similar timeline of operations every year (i.e. Society Expo in Sep, Audits in Oct, Gala in Nov, Study Sessions in Dec, etc.), it could be worth spending time into making an outline your society can follow for future years!
- It can be as simple as a list of reminders or things to be check every month.



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V. Contact Info

- It is by no means expected for a graduating Executive (or simply an Executive who is moving on) to continue to support their society post-end of term. However, it would be nice if the society could at agree on 1-2 point of contacts that new executives can reach out to if they have any questions.
- Additionally, if there are any parties with which your society collaborates with or you have specific inside contacts with, you should leave this to your previous executives too!

VI. Guiding Documents

- Any guiding documents that could help your future team figure out how things were done in the past would probably be of great help. Special note should be given to: **A) Budgets.** **B) Audits.** **C) Your Constitution.** **D) Meeting Minutes.**
- If your society has any advice on what should be edited about the Constitution for next year, let them know, as these edits should be done prior to re-ratification.

VII. Audits and Budgets

- If you are a Faculty or Levy Society, it should be of utmost importance for your Treasurer to walk the new VP Finance or Treasurer of your society through their Fall and Winter Audits. If an Audit has "PASSED", it means the DSU believes your method for financial record tracking is good enough. In other words, teach your successor how to replicate what you did!
- Any file that was used for budgeting should be saved! These can be lifesavers for societies.

VIII. Cleaning Up!

- If your society was given a Society Office, make sure the space is cleaned up organized by the end of your term. This information can be found in the MOU that was signed. Let your society know that they will be needing to either reapply or vacate.
- If your society was given a Society Locker, make sure the space is cleaned up organized by the end of your term. This information can be in the "Society Locker Contract" that was signed. Let your society know that they will need to either reapply or vacate.
- If your society uses a Society Email, make sure emails have been sorted out, tagged, starred, pinned, and all other things that could help your successors arrive to a clean inbox.
- If your society uses OneDrive or Google Drive for safekeeping files, make sure documents have been organized and that no important file has fallen between the cracks.

If you have any questions or require additional support, email dsusocieties@dal.ca and dsuvpi@dal.ca

DSU Society Transition Checklist - Incoming

Hello there!

If you are reading this, it means your society is going through our yearly transitional process where powers are transferred from a previous executive team to a new one for the new academic year. While all societies operate differently, almost all societies share a common thread of things that need to be done in order to get your group back up and running again. This non-exhaustive list should guide your new Executive Team in terms of what needs to be addressed after May 01st:

IX. Re-Ratification

- All DSU ratified societies are required to re-ratify to be recognized as official sub-organizations of the DSU. Ratification runs from the date granted until the next May 01st, and ratifications can be renewed starting May 02nd of every year.
- To re-ratify, have your society email dsusocieties@dal.ca after May 01st to receive the application form. If you are a General Interest or Constituent Society, the VP Internal will review your application. If you are a Residence Council, Levy, or Faculty Society, the Society Review Committee (SRC) will review it.

X. Re-Taking Training Modules

- All DSU ratified societies are required to re-train their executives (regardless of if they are returning or not) for a new academic year. All previously taken training is considered NOT VALID.
- PEO Training is mandatory for organizing events, and Treasurer Training is mandatory for opening a Bank Account. Society Orientation will be mandatory as dictated by the Coordinator.
- Executives can sign up for DSU Training opportunities under the "Society Training" tab in the DSU website. Dates will usually be published 2 weeks before the next academic session.

XI. Bank Accounts

- If you are a returning society with an existing Bank Account, make sure that the signing authorities have been changed prior to losing contact with the old Executives.
- Remember that you need to have access to your Bank Account in order to apply for funding with the DSU. Society Grants cannot be processed if you have not set up a bank account, or, if you do not have access to your own.



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XII. Introducing Yourself!

- If your society has access to a newsletter or mass emailing list, you probably want to send an email introducing yourself and the new team to everyone. Make sure to outline responsibilities carefully so that students know when to reach out to each of you!
- Sending an email with the newest and most up to date executives to dsusocieties@dal.ca and dsuvpi@dal.ca is recommended if these change after ratification.

XIII. Renewing Existing Contracts!

- If your society currently has access to any of the following: **A) Society Locker. B) Society Office. C) Individual Insurance (only applicable to certain Levy Societies). D) Any other MOU or agreements with the DSU or otherwise.** Make sure these are renewed and/or taken care of!
- You can email dsusocieties@dal.ca if you are unsure.

XIV. Accessing Existing Documents with the DSU

- Each society is responsible for safekeeping documents pertaining to their society. However, the DSU can assist you with accessing some of these files if you need them.
- You can contact dsusocieties@dal.ca to inquire about previously approved "Ratifications", "Events" and "Audits" for your society. The ratification record can provide you with old contacts and a constitution. The event records can guide planning stages of your event if you do not know where to start. The audit record will help you a lot if you have misplaced your Audit.

XV. Other Things

- Have all executives familiarize themselves with your Society's Constitution.
- In the DSU Website, under "Governance" -> "Governing Documents", make sure all executives read the "DSU Bylaws", "Grants Policy" and "Society Policy."
- In general, familiarize yourself with resources available on the DSU Website.
- Sign-up for all Training opportunities if you are unsure. PEO and Treasurer are mandatory.
- Consider applying for a Society Grant. Societies are eligible for up to \$500 per semester and \$1000 per academic year.
- Consider creating a Dal NetID if your society does not have a "society specific email". Using a society email is much more advisable than a personal one for your group's constitutional memory.

If you have any questions or require additional support, email dsusocieties@dal.ca and dsuvpi@dal.ca