

# **Actuarial Association Constitution**

## **Article I: Name**

The official name of the organization is the Actuarial Association at University of California, Santa Barbara, may be abbreviated as UCSB Actuarial Association or UCSB AA.

## **Article II: Purpose**

The purpose of the club is to:

- Encourage and support actuarial education.
- Increase awareness of the actuarial profession on campus.
- Provide a bridge between students and the actuarial industry.
- Offer a social network for students pursuing careers in actuarial science.

## **Article III: Membership requirement**

All non-officer members of the UC Santa Barbara Actuarial Association must be:

- UC Santa Barbara students who have paid the club membership dues and attend at least 3 events each year.
- UCSB Alumni who have paid alumni membership dues.
  - Note: Alumni can stay members for 1 year only.

## **Article IV: Officers**

### **A. Positions:**

The officers of the club shall be a President, Vice President, Treasurer, Journalists, Secretary, Community Development Coordinator, Exam Coordinator, Director of Technology, Case Study Coordinator, Outreach Coordinator, Volunteer Coordinator, Event Planning Officers.

### **B. General Duties:**

Due to the impact of actuarial exams on students' schedules, flexibility will be key here. Each position may require helping other officers with their respective duties.

### **C. Specific Duties:**

## **President**

1. Presides at all regular meetings of the club and supervises its general affairs.
2. Delegates various tasks to all officers and holds them accountable for their duties.
3. Sets the agenda for club meetings with the officers at weekly officer meetings.
4. Communicates with Actuarial Association Advisor to plan guest speaker events, quarterly event schedule, and important events such as: Actuarial Career Fair, Actuary Day, CA Actuarial Student Summit, Banquet.
5. Communicates information between Club Officers and the PSTAT department.
6. Represents members' opinions to PSTAT administration.
7. Provides consented members' metrics and academic information to PSTAT Department.

8. Signs up for event spaces and media A/V usage or delegates officers (event planning officers) to sign up for event spaces.
9. Confirms event calendar with club advisor for social & academic events 3 weeks before previous quarter ends.
10. Hosts PSTAT guest speakers and company info sessions.
11. Knows his/her own schedule as well as officers' schedules to plan events.
12. Plans academic events and hosts them (at least 5 per quarter).
13. Plans social & volunteering events with Vice-President (at least 3 per quarter).
14. Responsible for all event logistics and contents.
15. Holds each officer accountable for their responsibilities and keeps track of their attendance and involvement in the club.
16. Reviews club's Facebook page, email, website, instagram, Google drive, Flickr, and FB messenger weekly.
17. Attends every officer meeting (missing max 1 meeting per year).

### **Vice-President**

1. Organizes & works with Outreach, Volunteer, and Alumni coordinators to host social, volunteering, and networking events (at least 3 per quarter) .
2. Arranges volunteers for major PSTAT Department events.
3. Communicates with President for implementation of new ideas, feedback on events, etc
4. Manages and assists all officers, especially journalists, event planning officers, outreach coordinator, volunteer coordinator, and alumni coordinator.
5. Works with President to establish social events for the next quarter.
6. Orders club merchandise such as AA T-shirts, officer pins, mugs, stickers, etc.
7. Responsible for creating event polls, RSVP, and sign-up sheets for major academic events on FB page.
8. Uploads videos of social events on UCSB AA Youtube channel.
9. Reviews club's Facebook page, email, website, instagram, Google drive, Flickr, and FB messenger bi-weekly.
10. Attends every officer meeting (missing max 1 meeting each quarter).

### **Treasurer**

1. Responsible for receipt and deposit of funds from OSL (Office of Student Life) and AS (Associated Students).
2. Submits requests to AS and OSL for funding of major events such as Actuary Day, CASS, etc.
3. Collects member dues physically at club meetings and through Venmo account.
4. Responsible for reminding club members to pay membership before career fair deadline.
5. Keeps current list of paying members on an excel spreadsheet including Members': names, u-mail, personal email, planned graduation year, # of years they are active in the Actuarial Association.
6. Keeps correct record of transactions of the account and existing funds (Treasurer's Report) on a spreadsheet on the Google Drive.

7. Dictates a Treasurer's report (how much funds the Actuarial Association has) at the 1<sup>st</sup> officer meeting of each month, and submits most recent one to next treasurer.
8. Attends every officer meeting (missing max 1 meeting each quarter)

### **Social Media Journalist**

1. Takes pictures at every event and uploads them to FB as an album within 2 days of the event.
2. Shares the event link and album link with the PSTAT department.
3. Upload highlights of each event on the Instagram page within 2 days after the event.
4. Posts each FB page update from other officers on Instagram page.
5. Organizes and manages Event Albums on FB account.
6. Uploads a group picture of students graduating that quarter on FB at the end of each quarter.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Publications Journalist**

1. Creates an Event Page on FB for each event 1 week prior to the event.
2. Creates a Flyer according to department guidelines and outline from President and Vice President for each event 1 week prior to the event.
3. Shares flyer with club advisor for events held in collaboration with PSTAT department.
4. Checks actuarial websites & blogs (i.e. SOA, CAS) weekly and announces on club website and FB if there are any new articles..
5. Reports the list of students that have passed exam within the year before the Actuarial Banquet each Spring quarter.
6. Updates President and Vice President of expected headcount for each event based on FB event page.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Secretarial Journalist**

1. Creates a summary of the content presented at important club events for the articles to be published in the Journal.
2. Coordinates technological facilitation requirement of each event.
3. Responsible for the current AA Officers' group picture and sharing it with the club advisor.
4. Responsible for creating volunteer and carpool sign-up sheets for social events.
5. Manages and coordinates transportation for outdoor social events.
6. Updates Google drive with meeting agendas, minutes, and event files.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Secretary**

1. Records minutes during officer meetings and shares google drive link with club advisor when required.

2. Creates a sign-in sheet for members at each event and reports headcount at upcoming officer meeting.
3. In charge of club email, sending emails to PSTAT department and club members.
4. Posts reminders for upcoming officer meetings and events.
5. Manages updated record of officer absences and ensures non-members do not attend member exclusive AA events.
6. Updates officers' schedules on google calendar and has a record of updated club accounts' usernames and passwords.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Community Development Coordinator**

1. In charge of creating a strong, valuable mentorship program for all AA members.
2. Matches each mentor with mentee(s) according to members' preferences in google form.
3. Hosts at least 2 events every quarter for mentor/mentee interactions.
4. Volunteers for and find volunteers for Spring Insight and Fall Club Fairs.
5. Observes meetings and member interaction from an outside view in order to offer feedback to improve member retention.
6. Plans Summer session, and high school outreach with Outreach coordinator.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Outreach Coordinator**

1. In charge of coordinating with local middle schools and high schools for to implement new actuarial programs, volunteering events, etc. (1 per year).
2. Hosts event for transfer students orientation (1 per year).
3. Hosts event for Freshmen orientation (1 per year).
4. Plans officer availability during summer sessions.
5. Coordinates club activities with PSTAT department and Transfer student center.
6. Organizes club activities during summer sessions.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Actuarial Exam Coordinator**

1. Books library rooms for regular exam study sessions (at least once every 2 weeks) and updates meeting details on facebook.
2. Hosts workshops (2 per year) and coordinates study groups to help members collaborate on exam material.
3. Sends reminders and notifications about upcoming exams.
4. Shares exam material discount codes and a list of study materials per exam with club members.
5. Understands Exam reimbursement process.
6. Keeps track of students passing exams to be put in the quarterly Actuarial Account and updates Treasurer accordingly.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Director of Technology**

1. Updates club website with event flyers and photos from publications journalist and social media journalist.
2. Updates website with educational and current event content from President and Journalists.
3. Updates meeting details for case study meetings from Case Study Coordinator.
4. Updates meeting details for exam meetings from Exam Coordinator.
5. Communicates with all officers to keep the club events updated on the Google Calendar on the AA website.
6. Experienced with website design tools (WordPress) to improve the club website.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Case Study Coordinator**

1. Reserves rooms for case study meetings for each ongoing case study competition.
2. Announces ongoing case study competitions that for member participation in his/her PSTAT (relevant) classes.
3. Holds updated record of case study participants and completed competition levels for each case study challenge.
4. Plans at least 1 event per quarter to introduce the importance and procedures of Case Study Challenges.
5. Updates information about meeting details of case studies on FB page.
6. Organizes Case Study Teams according to experience and knowledge level of participants.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Alumni Network Coordinator**

1. Manages social media platform for alumni connection.
2. Reaches out to alumni and maintains contact with them to guide students.
3. Gathers information about previous alumni.
4. Helps club members connect with alumni through networking events.
5. Provides updated alumni information to PSTAT department.
6. Gathers information about students graduating during the current quarter.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **Volunteering Coordinator**

1. Plans the following quarter's volunteering events with President and Vice-President.
2. Finds volunteers to reach out to companies for career fair and arranges volunteers for career fair operations with PSTAT department.
3. Organizes and hosts at least 1 volunteering event per quarter or 3 per academic year.
4. Ensures honors students receive honors hours credit for volunteering hours.
5. Posts volunteering event sign-ups or delegates Journalists/webmaster to ensure volunteering sign-up is shared with members.
6. Creates annual list of volunteers for recognition during club banquet in Spring quarter.

7. Attends every officer meeting (missing max 1 meeting each quarter)

### **Event Planning Officers**

1. Reserves all required spaces for each event 2 week in advance.
2. Confirms media, projector, and A/V equipment with media services office.
3. Picks up media key from Kerr Hall 1st floor 1160 Collaborate Office.
4. Arranges food pick-up for each event, and responsible for set-up and clean-up of each event.
5. Works with Publications journalist to post event pages on facebook 1 week prior to the event.
6. Coordinates each event's logistic requirements with President, Vice President, and relevant Coordinators.
7. Attends every officer meeting (missing max 1 meeting each quarter).

### **D. Removal of Membership:**

If any officer has more than **3 unexcused absences** and/or consistently unfulfilling their responsibilities, the President has a right to remove them from officership. It is up to the President to decide details about which absences count as excused and/or unexcused. On the other hand, if the President is failing to fulfill his/her responsibilities, the club advisor has the right to replace them with whoever he/she sees fit. Officers may be removed due to negligence, failure to perform duties, violation of the constitution, or failure to meet the standards of membership.

### **Article V: Elections**

1) The self-nomination and online applications for officer position are due in the last week of Winter Quarter. Candidates may apply for several positions.

2) Officer elections will be held in the 1st General Meeting of Spring Quarter.

All candidates must be:

- Current UCSB students
- Paid members of the Actuarial Association.
- Attended at least 6 Association events in the current academic year prior to the election.

All voting members must be:

- Current UCSB students
- Paid members of the Actuarial Association.
- Attended at least 3 Association events in the current academic year prior to the election.

Applicants will present their agenda at the general meeting of Spring quarter.

**Note: All voting members will need to show their ID cards for verification and need to stay for the election for its entire duration (or their vote does not countc).**

3) Final decisions, based on the results of the vote and other relevant information, will be made by the *body of current officers of the Association who are **not candidates** for positions*. If necessary, e.g., in case of a tie vote, the officers may request additional interview.

4) To assure fairness of the decision, the Association advisor will approve the officer selection for the following year before the results are out.

All decisions will be made by mid-Spring quarter and new officers will begin to shadow current officers.

#### **Article VI: Meetings**

A. Club year begins in September and ends in June. At least one meeting a week will be held each quarter. Specific dates of the meetings will be determined by club officers.

B. An officer meeting shall be held every week at a consistent time each quarter weeks 1 through 9. The specific time will be determined by club officers.

#### **Article VII: Financial Matters**

Registered campus organizations must follow the UCSB Campus Regulations Applying to Campus Activities, Organizations and Students in all financial matters and accept full responsibility for all activities which bear the organization's name as official sponsor. All funds raised using University facilities must be deposited in an Office of Student Life trustee account and may be withdrawn in accordance with the organization's purpose. Only the individuals whose names are on file with the Office of Student Life can authorize expenditures for the organization.

#### **Article VIII: Constitutional Amendments**

Amendments to this constitution, from 06/04/18 on, requires a two-thirds vote of the general membership at a regular meeting. Any Amendment, deletion or addition must be filed with the Office of Student Life within one week of adoption.

#### **Article IX: Dues**

Payment of \$30 per year (Alumni membership- \$10/year) or \$15 per quarter in membership fees is required to become a member of the UCSB Actuarial Association. These fees are to be used to promote club events, and for purchase of materials to enhance actuarial education of club members. The amount charged for club dues is at the discretion of club officers, based on the expectation of necessary funding for upcoming club events.