# How To Run a Club

## A Guide for VPF's and Presidents

### August 21, 2021

Note about this document: every underlined word is a clickable link that refers you to the needed resource :)

# Start of Term

☐ **Elect your execs**

- All execs must be <u>MathSoc members</u>

☐ **Submit records**

- Make a document with this info:
  - ☐ Contact email
  - ☐ List of execs
  - ☐ List of events you want to run in the term
- Email to <u>MathSoc VPF</u>
  - ☐ Email subject: "Club Records F21- <Club Name>"

☐ **Create a budget**

- <u>MathSoc VPF</u> will send the <u>Budget</u> to your club email
  - ☐ Make a copy of the Budget
  - ☐ Fill in your budget
    - · Decide on events for the term
    - · Decide on expenses
    - · Put repeated events in the same row
    - · Add new rows if needed
    - · Don't delete rows
    - · Budget carefully! You can't go over budget
  - ☐ Add notes to each cell to explain the expense
  - ☐ Email to <u>MathSoc VPF</u>
    - · Email subject: "Budget Submission F21- <Club Name>"

☐ **Club finances audit**

- where to find document??
  - ☐ Create summary of previous term's revenues and expenses
  - ☐ Add a note for each line item that explains the expense/revenue
    - · Include event number, if applicable
  - ☐ Email to <u>MathSoc VPF</u>
    - · Email subject: "Club Finances Audit F21- <Club Name>"

☐ **Events *before* budget meeting**

- You can run events before budget meeting for **less than** $500
  - ☐ Email <u>MathSoc VPF</u> to arrange this
    - · Email subject: "BOT Budget Approval F21- <Club Name>"

☐ **Club budget info meeting**

- <u>MathSoc VPF</u> will send you the invite
  - ☐ Attend the meeting
  - ☐ Take notes

- See Budget Meeting Slideshow
- See Further Resources

☐ **MathSoc Budget meeting**

- One rep from the club needs to come
    ☐ Present the budget to MathSoc
        · Explain a little bit about the events you want to run and the expenses you'll have
        · Convince them to give you money
        · Alcohol at events needs to be approved explicitely
        · Be reasonable in your requests
- Council will decide to accept, modify, or reduce your budget

# During the Term

## HOW TO RUN AN EVENT

- **Before an event**

    ☐ Fill out **14 days before**: Clubs Event Form
        - Bookmark the <mark>EMAIL</mark> response (1-3 days)
    ☐ Plan expenses according to your Budget
    ☐ Email MathSoc VPI for marketing needs
    ☐ Email MathSoc VPO to get volunteer positions listed on Mathsoc Website
    ☐ Follow MathSoc Logo Guidelinesfor ads/posters

- **During the event**

    ☐ Check that prize winners are MathSoc members
    ☐ Make all purchases yourself: keep the receipts!

- **Getting refunded from MathSoc**

    1) Fill out MathSoc Cheque Request Form
        - Find the budget line in the Budget
        - Find the Event ID in the subject title of this <mark>EMAIL</mark>
        - List tax and tips separate
        - Ask a club signing officer (VPF or President) *other than yourself* to sign
    2) Collect all your receipts
        - *Online events*
            · Screenshot the receipts
            · $\geq$ \$100: SAVE the receipt until reimbursed!!
        - *In-person events*
            · Get physical receipts (print if necessary)
    3) Get your Proof of Payment(unless in-person event and $<$ \$100)
    ☐ Send 1), 2), and 3) in an email to MathSoc VPF
        · Email subject: "Cheque Request F21- <Club Name>"

- **Non-budgeted expenses**

    ☐ Don't make this a habit

    ☐ Email <u>MathSoc VPF</u>

        · Email subject: "Out-of-budget Expense F21- <Club Name>"
        · < \$100: Have to be approved by <u>MathSoc VPF</u>
        · ≥ \$100: Have to be approved by MathSoc Council

- **Amending constitution**

    ☐ Amend your constitution as necessary

    ☐ Provide an updated copy of the constitution to the <u>MathSoc President</u> .

# End of Term

☐ **Submit records**

- Collect the following info:
    ☐ Full membership list
    ☐ Club fees
    ☐ Other revenue (ex. sales)

☐ Email it to <u>MathSoc VPF</u>

    · Email subject: "End of Term Records F21- <Club Name>"

# What is a Proof of Payment?

- Go to your bank account

- Screenshot your account so the all of these are visible:

    ☐ Your name
    ☐ Transaction amounts
        · Transaction can't be "pending"
    ☐ Date of purchase
    ☐ Vendor (the seller)
    ☐ ≥ \$100: include account number

- Blur out all other information

# Check that Someone is a MathSoc Member

☐ If they are on an academic term:

- Go to <u>member.wusa.ca</u>
- Log in with your WatIAm
- Click on your name in the top right
- Click **Admin**
- Click **Member Verification**
- Click **Watiam Verification**
- Enter the person's WatIAm

☐ If they are not on an academic term:

- Ask if they paid their mathsoc fee in their most recent academic term
- Make them pinky promise that they're telling the truth

# Useful Links

- Budget
- Budget Meeting Slideshow
- Clubs Event Form
- MathSoc Cheque Request Form
- MathSoc Clubs Policy (Policy 6)
- member.wusa.ca
- Mathsoc Website
- MathSoc Logo Guidelines
- Waterloo Colours

# Where to Get Help

- MathSoc VPF : Sandra Huang
  - Funding
  - Budget
  - Membership fees
- MathSoc VPI : Abhiraj Lamba
  - Club fairs
  - Outreach
- MathSoc VPO : Arnav Gupta
  - Mathsoc Website
- MathSoc President : Harleen Bhandal
  - All other queries