How To Run a Club

A Guide for VPF's and Presidents

August 22, 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 (includes TAX, TIP, SHIPPING,etc)
        · 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**

- Create a document
- Ask the previous club VPF and compile the following info:
    ☐ 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**

- Need *written approval* from <u>MathSoc VPF</u> or <u>MathSoc President</u>
- Only **less than** $500
    ☐ Email <u>MathSoc VPF</u> to arrange this
        · Email subject: "BOT Budget Approval F21 - <Club Name>"

☐ **Club budget info meeting**

- MathSoc VPF 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 explicitly
    - · 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 Guidelines for ads/posters

- **During the event**

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

- **Getting refunded from MathSoc**

  - Submit NO LATER THAN 2 WEEKS AFTER EVENT unless otherwise arranged with MathSoc VPF
  - 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 you paid cash)
  - ☐ Submit 1), 2), and 3)
    - *Online events*
      - ☐ Send to MathSoc VPF ; email subject: "Cheque Request F21 - <Club Name>"
    - *In-person events*
      - ☐ Hand in to MathSoc office (MC 3038)

- **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
    - ☐ Send 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: last 4 digits of account number have to be visible

- Blur out all other information

Check that Someone is a MathSoc Member

☐ If they are on an academic term and you are a current club exec:

- 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 on an academic term and you are *not* a current club exec:

- Email <u>MathSoc President</u> to ask to check for you
    - · Email subject: "MathSoc membership status check <Student's WatIAm> - <Club Name>"

☐ 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 queries

- MathSoc President : Harleen Bhandal

  · All other queries