

# 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 MathSoc members

#### ☐ **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 MathSoc VPF

- Email subject: "Club Records F21 - <Club Name>"

#### ☐ **Create a budget**

- MathSoc VPF will send the Budget 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 MathSoc VPF

- 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 MathSoc VPF

- Email subject: "Club Finances Audit F21 - <Club Name>"

#### ☐ **Events *before* budget meeting**

- You can run events before budget meeting for **less than** \$500
  - ☐ Email MathSoc VPF 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

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### HOW TO RUN AN EVENT

#### • Before an event

- ☐ Fill out **14 days before:** [Clubs Event Form](#)
  - Bookmark the **EMAIL** 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

- 1) Fill out MathSoc Cheque Request Form
    - Find the budget line in the [Budget](#)
    - Find the Event ID in the subject title of this **EMAIL**
    - 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)
- ☐ 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)
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- **Non-budgeted expenses**

- ☐ Don't make this a habit
- ☐ Email MathSoc VPF
  - Email subject: "Out-of-budget Expense F21 - <Club Name>"
  - < \$100: Have to be approved by MathSoc VPF
  - $\geq$  \$100: Have to be approved by MathSoc Council

- **Amending constitution**

- ☐ Amend your constitution as necessary
- ☐ Provide an updated copy of the constitution to the MathSoc President .

## End of Term

- ☐ **Submit records**

- Collect the following info:
  - ☐ Full membership list
  - ☐ Club fees
  - ☐ Other revenue (ex. sales)
- ☐ Email it to MathSoc VPF
  - 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)
  - ☐  $\geq$  \$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 [member.wusa.ca](http://member.wusa.ca)
  - 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](#) queries
- [MathSoc President](#) : Harleen Bhandal
  - All other queries