Club Presidents/Exec Training

Winter 2020
Contact List

Rachel Lui
Clubs Manager
clubs.manager@wusa.ca

Nada Abouelnaga
Clubs Assistant
clubs.assistant@wusa.ca

Dave McDougall
Director, Student Engagement
jmcdougall@uwaterloo.ca

Clubs Support Team
FB: WUSA.Clubs
clubs.support@wusa.ca

Amanda Fitzpatrick
VP Student Life
vpin@wusa.ca

Cheryl Pflug
Accounting Manager
cpflug@uwaterloo.ca

Mike Cimetta
Accounting Clerk
mcimetta@wusa.ca

Alana Guevara
Accounting Clerk
acguevar@wusa.ca

Reception
SLC 1116
recept@wusa.ca
Clubs Support

Clubs Assistant | clubs.assistant@wusa.ca
• Assist with cheque requests, AV forms, general inquiries, etc.

Clubs Support Team | clubs.support@wusa.ca | FB: Feds Clubs
• Office Hours: 10am-3pm M-F in SLC 2139 (Clubs Community Center)
• Selected at the end of the previous term for next term (check out LEADS)
• Club-to-club and club-to-WUSA relationship building, event engagement/help, etc.
Quick Question?

Message the WUSA Clubs Facebook page for the fastest response!

@FEDS.CLUBS
Important Club Websites

https://wusa.ca/clubs/
- Training/Meetings
- Clubs and Societies Days
- Office Hours

https://clubsadmin.feds.ca/
- Term Acknowledgment forms
- Club Email/Web Site Requests
- New Club Applications
Updates

• Waterloo Undergraduate Student Association (WUSA)
  • To better reflect who we are, what we’re here to do and who we represent
• Student Choice Initiative
• New Online ITMS AV form
  • [https://wusa.ca/clubs/clubs-important-forms/av-equipment-and-services-request-form](https://wusa.ca/clubs/clubs-important-forms/av-equipment-and-services-request-form)
• New Debit/Credit machine available for booking
Updates

• Club travel policy/overnight trip policy
  • Any travel arrangements must be made via a travel agent
  • Approval is on a case-by-case basis, No alcohol outside of a licensed establishment

• Crave

• Clubs can access 1TB cloud storage and Microsoft Office 365 by having a clubs.feds.ca email!
Internal Administration Committee (IAC)

- The Final Authority on Clubs
  - New club applications and constitution amendments
  - Clubs policy changes
  - Disciplinary action against clubs
- IAC members are active students who are usually involved in clubs and/or societies
- Chaired by the VP Student Life
- Only full time staff member (i.e. non-student) on committee is the Clubs Manager
  - Solely to provide information or clarification
  - Does not have decision making vote
Marketing

• Marketing consulting/advice
• Club branding
• Graphic design
• Poster and banner printing
• Assistance with promotion
• For a reasonable fee, you can also purchase custom stand up banners!
Club Marketing Requests

• Log into https://request.wusa.ca/ using your WatIM and password

• Select “Marketing Request”

• Select “Create Request”

• Note: only one attachment can be uploaded, for multiple files please upload a zip. file
Club Posters

• Club posters should include:
  • WUSA Clubs Logo (can be found on https://wusa.ca/clubs/clubs-important-forms
  • Club’s own logo (optional)
  • Club contact info
  • Clear event info (if applicable)
    • Who is involved (hosts/sponsors/etc.)
    • Date/time/location
    • Ticket info (how much, where to buy, etc)
WUSA IT

- Send requests through [https://request.wusa.ca](https://request.wusa.ca).
  - Clubs Admin Database: IT Requests > Web Application Issue > Create Request
  - General IT Requests: IT Requests > General Request
- IT provides support for: web hosting, clubs.feds.ca emails, LAN events, etc.
  - clubs.wusa.ca email now has access to 1TB cloud storage and Office 365 Suite!
Accounting

• WUSA Accounting is Here to Help!
  • Email questions or swing by the WUSA Main Office between 9:30am-4:30pm, Monday-Friday

• Ensure Clubs Follow Accounting Standards & Government Regulations

• Free Financial Services:
  • Cheque Printing
  • Invoicing
  • Sales and Deposits Tracking
Accounting – Money Handling

- Deposits Safe in Drop Box
  - Located to the right of the old WUSA Main Office door, SLC Great Hall
  - Safe and secure, deposit 24-7-365!
  - Club money must be deposited IMMEDIATELY
    - DO NOT STORE CLUB FUNDS ANYWHERE
  - Collected and counted by 2 WUSA Accounting staff next business day
Federation of Students

(please write legibly)

Date: ___________________________

Club/Service: ______________________

(No abbreviations please)

Purpose of Deposit

(Membership fees, event, bake sale, donations etc.)

<table>
<thead>
<tr>
<th>Number of notes or coins</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.05</td>
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<tr>
<td>$0.10</td>
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<td>$50.00</td>
<td>$50.00</td>
</tr>
<tr>
<td>$100.00</td>
<td>$100.00</td>
</tr>
</tbody>
</table>

# of Unsold Tickets

Cheques

Name on cheque | Amount on cheque

<table>
<thead>
<tr>
<th>Cheque</th>
<th>Amount</th>
</tr>
</thead>
</table>

Total | Amount of Deposit $ |

Depositor’s Name ___________________________

Signature _____________________________

Signature _____________________________

Depositor’s Email ___________________________

CLUBS / SERVICES

DEPOSIT PROCEDURE

• If a float was taken from FEDS office, deposit it in a separate envelope not with any other money and indicate float in the purpose line.

• Please place all unsold tickets in a separate envelope from cash and fill in the number of tickets in the cell provided.

• Complete the deposit envelope ensuring you fill in the number of coins or bills for each denomination and the total.

• Place the money in the envelope and have turnover date and time stamp envelope.

• Two people from each club or service must count and sign the envelope.

• Place the envelope in the safe.

• Return empty cash box to Feds office. (If office is closed, return next business day.)

• Please ensure you fill in the email address legibly as Feds accounting will send an email confirming the deposit amount within 2 business days.

• In case of any deposit discrepancy, FEDS accounting’s count will be considered correct.
Accounting – Sponsorship/Invoices

Alana Guevara(acguevar@wusa.ca)

- Alana can issue official WUSA invoices on behalf of your club
  - Clubs should not be invoicing themselves
- Sponsorship Cheques to Clubs Made Payable to “WUSA [Club Name]”
  - Email Jess expected cheque amount and company name for your club
Reception

9am-4:30pm M-F | SLC 1116 | x84042 | recept@wusa.ca

- Book Poster Runs: [https://uwaterloo.ca/feds/clubs-services/poster-run](https://uwaterloo.ca/feds/clubs-services/poster-run)
- Book debit/credit terminals
- Book cashboxes
- Drop off cheque requests & pick up processed cheques
Poster Runs

- Poster Runs: [https://wusa.ca/clubs-services/poster-run](https://wusa.ca/clubs-services/poster-run)
- Booked through Club makes copies of all receipts and cheque requests
- Reception, posters approved by Clubs Manager
  - Due Thursdays at 10am for Friday distribution (weekly)
  - Posted for maximum 2 weeks
  - Large Run (127 Posters Fall/Winter Term, 83 Posters Spring Term)
  - Small Run (27 Posters Fall/Winter/Spring Term)
  - Cost varies by space size and run type, $8-24 for clubs, $15-36 for Societies
- 3 Public poster kiosks and Faculty Society poster boards available
Important Forms

- Event Forms
- Event Calendar Forms
- BBQ Forms
- Region of Waterloo Food Vendor Forms
- Ticket Request Forms

- Cheque Requests
- Locker Request Forms
- Key List Forms
- Liability Waiver Forms
Digital Term Acknowledgment Forms

• Have one of the previous signing authorities log onto https://clubsadmin.wusa.ca/ using their Quest credentials
• Select the clubs listed under “Your Club Memberships”
• Select “Submit Signing Authority Form for [Term] [Year]”
• Input your 15 members’ WatIMs and Student Numbers
• The three signing authorities will need to log in and verify they are a signing authority to be considered active
Digital Term Acknowledgment Forms

• Don’t see your club in the Database?
  • Email clubs.support@wusa.ca or clubs.assistant@wusa.ca to confirm if you are in the database
  • If you are in, please contact the previous active signing authorities to input the information for you
    • If the previous active signing authorities are not responsive, email your acknowledgment form into clubs.assistant@feds.ca
  • If you are not, please put in a new club application
    • Main Page > “Your Club Applications” > “New Club Application”
• Current Capabilities
  • New Club Applications, Term Acknowledgment Forms
  • Request your free clubs.wusa.ca email, free web hosting
  • Request your club listing to be featured on wusa.ca
• Have a suggestion for the Clubs Admin Database?
  • Email the Clubs Support Team clubs.support@wusa.ca
Submit a form for *all* club activities (meetings, socials, on/off campus events..)

- **Events Open to General Public:**
  - Anyone from anywhere is allowed to attend (i.e. non-club members, non-students, non-UW)
  - Approved Food Vendor Form needed for events open to general public with food

- **Events Closed to UW Community at Large:**
  - Open to alumni and community members either involved in University of Waterloo campus activities or associated with the University of Waterloo

- **Events Closed to Club Members Only**
Event Form Warning

• All events involving the club (held on or off campus, big or small, just attending or hosting) require an event form submitted and approved

• What if I don’t submit an event form or not follow a previously approved events’ details?
  • Without approval, the event is not officially sanctioned and the club is officially not involved
  • Club funds cannot be used (i.e. cheque requests cannot be processed)
  • You are not covered under Feds insurance – leaving you personally liable for damages

*Are you willing to give up your life savings and potentially ruin your life?*
Event Form Warning

Any club found not submitted an event form will be forwarded to IAC for disciplinary action

When in doubt, submit an event form!

https://wusa.ca/clubs/clubs-important-forms
Event Forms

• Things to keep in mind:
  • The main club email under “Email Address” (personal email optional in description)
  • The name of the person filling out the form under “Contact Name”
  • Double check the correct date and time is inputted before submitting
  • Click submit button once – give it time to process
  • Clearly and concisely explain details in description
  • Clubs form for WUSA clubs, Societies Forms for Societies and Society Clubs
Ticketing Events

- Events with money changing hands require tickets (i.e. entrance fees)
- Tickets can be:
  - Online through Ticketfi (Club must be set up under WUSA Ticketfi – contact Clubs Manager)
  - Physical tickets
- Ticket revenues must be deposited immediately and cannot be used directly for other club purchases
Cheque Requests

Things to keep in mind:

• Itemized receipt/invoice and proof of payment or registered charity numbers
• Be descriptive in Purpose
  • Event id # required if expense for event
  • Don’t just put “reimburse club member”
• Two signing authorities needed
  • Signing authority cannot approve their own request
• No Alcohol
• Mail vs pick up at WUSA reception

• Not enough funds in account = no cheque
• Requests must be made in Canadian Dollars
• Processing Time;
  • Invoices processed Wednesdays
  • Regular cheque requests processed Tuesdays and Thursdays
  • Allow about a week to process once sent to accounting
Cheque Requests

Common Issues Causing Cheque Request Delays:

• Incomplete form or inaccurate information (i.e. missing payable name, amounts don’t match, “legal name” vs “nickname”, etc.)

• Form is not legible or spelling is incorrect

• Proper receipts are not attached
  • Just a debit/credit slip or bank statement isn’t acceptable
  • Itemized receipts require: name, address, phone number, and HST number
  • “Fake” invoices

• 2 of 3 WUSA signing authorities are unavailable – plan ahead, submit as early as possible
Cheque Requests

- All gift card recipients must give the following information before being given the card:
  - Full name
  - Address
  - Phone Number
- Gift cards are only intended for specific purposes, such as prizes or appreciation
Region of Waterloo Food Vendor Forms

No need to submit a special event form if:

- Sale or distribution of non-perishable food or prepackaged items only (cookies, cake, muffins, Krispy Kreme donuts, coffee, tea, popcorn)
- A club meeting or club member only pot luck where there is food served
- A catered event or meeting with food intended for immediate consumption (i.e., Food Services or an inspected facility)
- A charity food sale with food purchased from inspected facility (e.g., Pizza sale with pizza supplied from Campus Pizza, Krispy Kreme donut sale)
- BBQ’s on campus where only precooked burgers and/or precooked hot dogs are served

Note: Where forms are submitted under the above circumstances, ROWPH will not reply regarding any approvals.
Region of Waterloo Food Vendor Forms

Please submit a special event form if the event is open to the general public and:

• Food preparation is occurring on site of event or at the WUSA Prep Kitchen for the event (ie. Night Market)
• Hot or cold holding AND service of hazardous foods for more than 2 hours

For more information on properly serving food at events on-campus, please explore Health Services’ webpages on Food Safety:

https://uwaterloo.ca/occupational-health/food-safety
Club Allotment

• Up to $75.00 per club, per term
• Based on eligible spend
• Calculated based on the club’s account transactions that term
  • Expenses processed late roll into the next term’s allotment calculation
• Automatically paid out at the beginning of the term
Club Allotment – Eligible Purchases

- Purchases considered for the club’s termly allotment (up to $75 per term) must:
  - Be directly related to fulfilment of the club purpose; and
  - Are available for use by and/or open to all club members

- Examples of ineligible purchases (i.e. the club must budget for, not repaid by the allotment):
  - Fees and/or penalties (i.e. ITMS late fee, conference fees, etc.)
  - Exec only events and/or materials (i.e. meals, swag, etc.)
  - Donations, payments to the club’s affiliated organization (if applicable), etc.
Club Allotment – Eligible Purchases

• Examples:
  • A club wants to hold a fundraiser and donate the proceeds to a charity. WUSA will not count the charity cheque amount in the allotment calculation, but WUSA will count all the expenses related to the fundraiser event itself (i.e. food, materials, etc.).
  • A club wants to send a delegation to a conference. Since the entire club is not able to go to the conference, WUSA will not count the conference expenses in the allotment calculation. The club has a few options, namely:
    • Charge the attendee(s) the cost of attending (typically through setting up a Ticketfi event)
    • Hold fundraisers open to everyone to attend (those expenses would be considered for the allotment)
    • Subsidize or completely cover the cost of sending the delegate(s) out of the club’s budget (i.e. the club has a surplus)
    • Reach out to sponsors (pending confirmation of the sponsorship terms and conditions by the Clubs Manager)
Additional Funding

- [https://wusa.ca/funding](https://wusa.ca/funding)
- Enterprise, Opportunity, and Innovation Fund
  - Special Projects Fund
  - Student Life Endowment Fund (SLEF)
- Faculty Endowment Funds (i.e. Math Endowment Fund, etc.)
- Corporate Sponsorships (*Must be approved by Clubs Manager*)
- Fund Raisers (i.e. Bake Sales, BBQs, etc.)
Other Things:

• Clubs Community Center
  • Your Space! 10am-3pm M-F
  • Clubs Support Team Office Hours M-F 10am-3pm
  • CCC Lounge is Bookable

• Deposits Drop Box
  • Available 24/7/365
Important Clubs Dates

• WUSA Awards due March 6th
  • Nominate someone for the WUSA Awards, found here: https://wusa.ca/clubs/clubs-important-forms/feds-awards-nomination-form

• Volunteer Appreciation Monday March 16th

• Clubs Week
Tips for Success and Longevity

• Know Your Constitution!
  • Executives are elected not hired
  • Executive transitions and training

• Be Proactive
  • Book events in advance
  • Better spending an hour asking questions, than 10 hours fixing problems

• Be Open, Respectful, and Cooperative!
  • Co-host events with other clubs, be open and welcoming
  • Remember: you represent your club, the clubs system, WUSA, and UW
Action Items

• Make sure your club is in the database (https://clubsadmin.feds.ca/)
• Transition to clubs.wusa.ca emails
• Review the clubs manual, exec training slides, and https://wusa.ca/clubs/
• Strategic Planning
  • Transition, branding, step-by-step, “how-to” for exec roles, etc.
• Submit event forms early and any time the club is involved
• When in doubt ➔ ASK
Q&A

Thanks for coming! Any Questions?