
SOME USEFUL INFORMATION: CONTACTS AND PROCEDURES

*PRESENTATION TO THE GBC, UBS
& STUDENT CLUBS AND ORGANIZATIONS
May 29, 2018*

Sean Siddik
Office of the Dean
416-736-5844

Susan Kimberley
Senior Event Planner
416-736-2100 x 33574

Tervetuloa Witaj Kosh Aamadid
Dobre Doshli Inde Torn Lap Shagatom
Velkommen Aloha Mai Valkommen
Maeva
Kalos Orisate Chàò mung Laipni Ludzam
Welcome Bienvenue
Bienvenido Dobro došli Willkommen
Swaagatam Amkela Bitaemo
Biin Dig Gain Welkom Merhaba
Aloha Mai
Bruchim habayim Dobrodoshli Ulsten Hozta
lorana Benvenuto
Hue Ying Selamat Datang
Oso oseyo Willkumm
Bruchim Habayim (Habaim) Irashaimaisu

CLUB EXECUTIVE TEAM TRANSITIONS

ADA WEBSITE FOR STUDENT CLUBS

PROCESS AND PROCEDURES

- EVENT PROPOSAL FORMS (EPFS)
- CHARITIES/RAFFLES/LOTTERIES
- EXCURSIONS/FIELD TRIPS/CASE COMPETITIONS

MAIL ROOM – OFFICE SERVICES

CLUB OFFICE KEYS

KEY CONTACTS

CDC

SPONSORSHIP 101

RISK MANAGEMENT

FINANCIAL TRANSPARENCY

- RESPONSABILITIES OF OUTGOING EXECS
- RESPONSABILITIES OF INCOMING EXECS

QUESTIONS

ADA WEBSITE FOR STUDENT CLUBS

Schulich School of Business



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Schulich Home

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Student Room Bookings & Clubs

Student Breakout Rooms

Clubs & Club Events

Overview

Breakout rooms are used on a reservation-only basis and can be booked within the following time frames:

- Keele Campus: Monday – Sunday, 8:30am – 12:30am
- Executive Learning Centre*: Monday – Sunday, 6:00pm – 10:00pm
- Nadal Centre*: Monday to Thursday 8:30am – 10:00pm, Friday 8:30am-4:00pm

* Graduate students only

+ Booking Policies

+ How to Book

+ Housekeeping Rules

Student Breakout Rooms

Clubs & Club Events

Student Clubs

Student Clubs at Schulich have two masters — their respective Student Government (UBS or GBC) and the school's administration. Clubs need to satisfy the requirements of both in order to remain in good standing and to be able to host events. Please contact the UBC or GBC for the appropriate club policy.

Please click below to download the Administrative Club Policy and orientation slides for clubs:

[Student Club Policies](#)
[Club Presentation Deck \(as of March 2017\)](#)

Please note that, to be sanctioned, clubs must meet Financial and Organizational Transparency requirements.

Please download the club policies document, above, the checklist, the letter of authorization and a sample financial statement below:

[Sample Financial Statement](#)
[Outgoing Checklist 2016-2017](#)
[Letter of Authorization Template as of Oct 2015/2016](#)
[Incoming Checklist 2017-2018](#)

Student-Organized Events

Please consult pages 6 and 7 of the above club policy for more information on events. Also download and read the Workflow for event proposals, below, which contains information on the organization of events. The event procedure defines who may book events and what the requirements are for different types of events. Events must be applied for using the Event Proposal Form.

For further questions, or to obtain feedback on events you may be considering, please contact Schulich's Senior Event Planner, [Susan Kimberley](#).

Please download (fillable) PDF versions of the policy and event proposal form:

[EPF Approval Process](#)
[Event Proposal Form \(Sept. 2017\)](#)

Student Government Information on Clubs

Please also see the following links for more information on clubs:

[Graduate Clubs](#)
[Undergraduate Clubs](#)

<http://ada.schulich.yorku.ca/student-room-booking/>

REVISED
EPF
May 2016

Please note: Room bookings require up to 7-10 business days advanced notice!



EVENT PROPOSAL FORM

Schulich School of Business
Student Clubs

Initiator: [redacted] Club President: [redacted]
Club/Organization/UBS/GBC: [redacted]
Email: [redacted] Phone Number: [redacted] Date: [redacted]
Club Advisor (Faculty/CDC Advisor): [redacted]

EVENT:	Approximate Number of Participants:		ID Number:
Start Date:	Start Time:	Finish Date:	End Time:

RESOURCES: (Check all that apply)				<input type="checkbox"/> Off Campus Event
<input type="checkbox"/> Auditorium	<input type="checkbox"/> Private Dining Hall	<input type="checkbox"/> Weekend Event	<input type="checkbox"/> Student Common	
<input type="checkbox"/> Dining Hall	<input type="checkbox"/> Multiple Room Booking	<input type="checkbox"/> Catering	<input type="checkbox"/> McDuffs Café (2 nd Floor)	
<input type="checkbox"/> Classrooms	<input type="checkbox"/> Breakout Rooms	<input type="checkbox"/> Tuchner's	<input type="checkbox"/> 3 rd Floor Lounge	
<input type="checkbox"/> Use of Audio/Visual Equipment (Any Classroom A/V can be used at a cost):				<input type="text"/>

Scope and Details:

Note: Event Proposal must be completely approved by the School according to deadlines set forth in the policies.

Written Proposal Attached? (Y/N)?		Detailed Budget Attached? (Y/N)	
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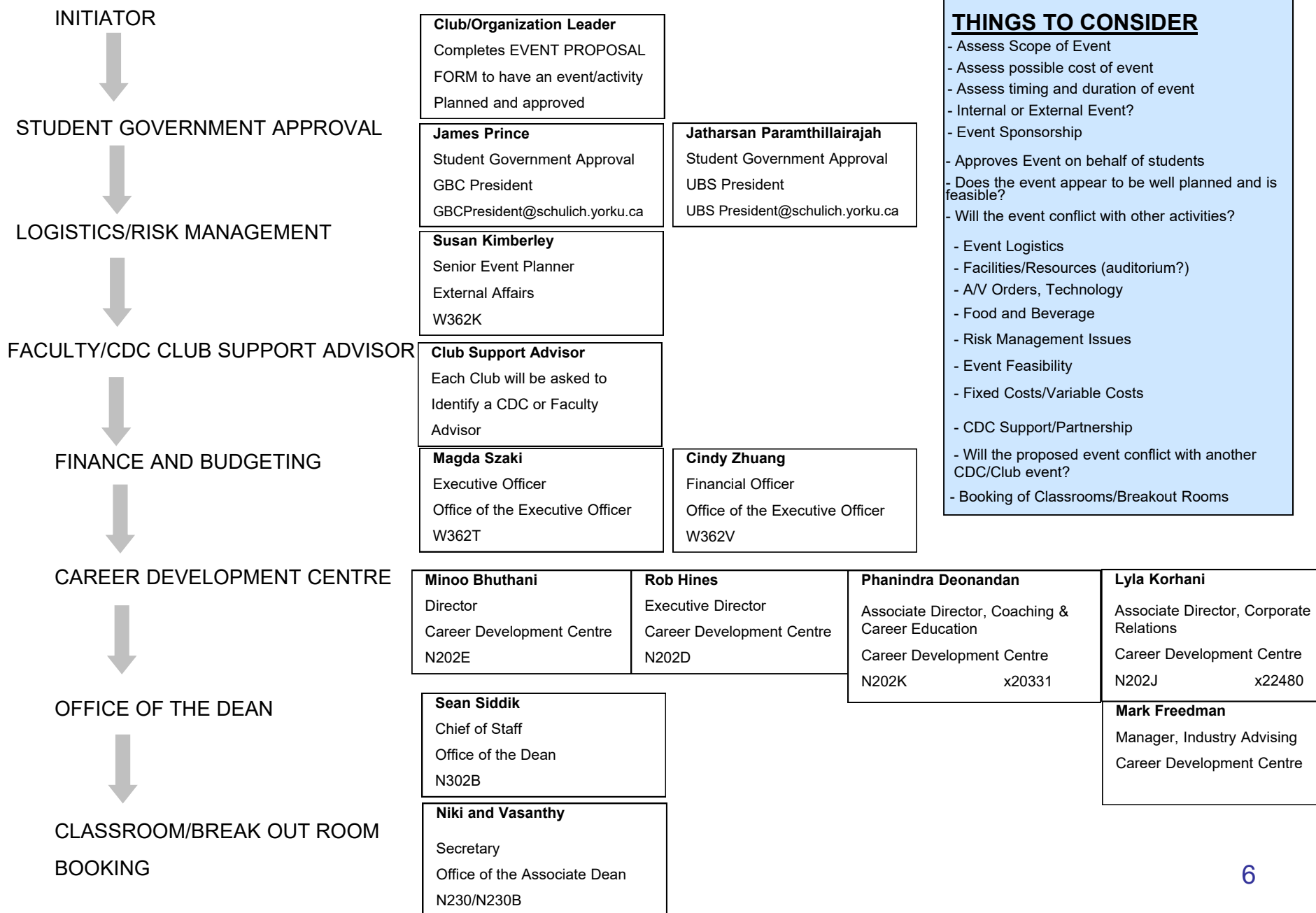
Sequence	Approver Name	Proposal Approved (Signature/Initials)	Date	Comments Attached?
1. Sanction from Student Body GBC W140B, UBS W140C				
2. Event Planning & Logistics (Susan Kimberley W362K)				

Sequence	Required to Sign? (Sr. Event Planner's Initials if yes – Susan Kimberley)	Proposal Approved (Signature/Initials)	Date	Comments Attached?
3. Schulich Finance & Budget (Tina Anderson, W362V)				
4. Career Development Centre (Minoo Bhutani or Lyia Korhani)				
5. Dean's Office (Sean Siddik, N302G)				

Classroom(s) booked:		All Required Event Staff Above Must Sign Approval Before A Room Can Be Booked
Approved by (ADA Office):	Date:	

Revised: May 2015

EVENT PROPOSAL FORM: PROCESS FLOW CHART

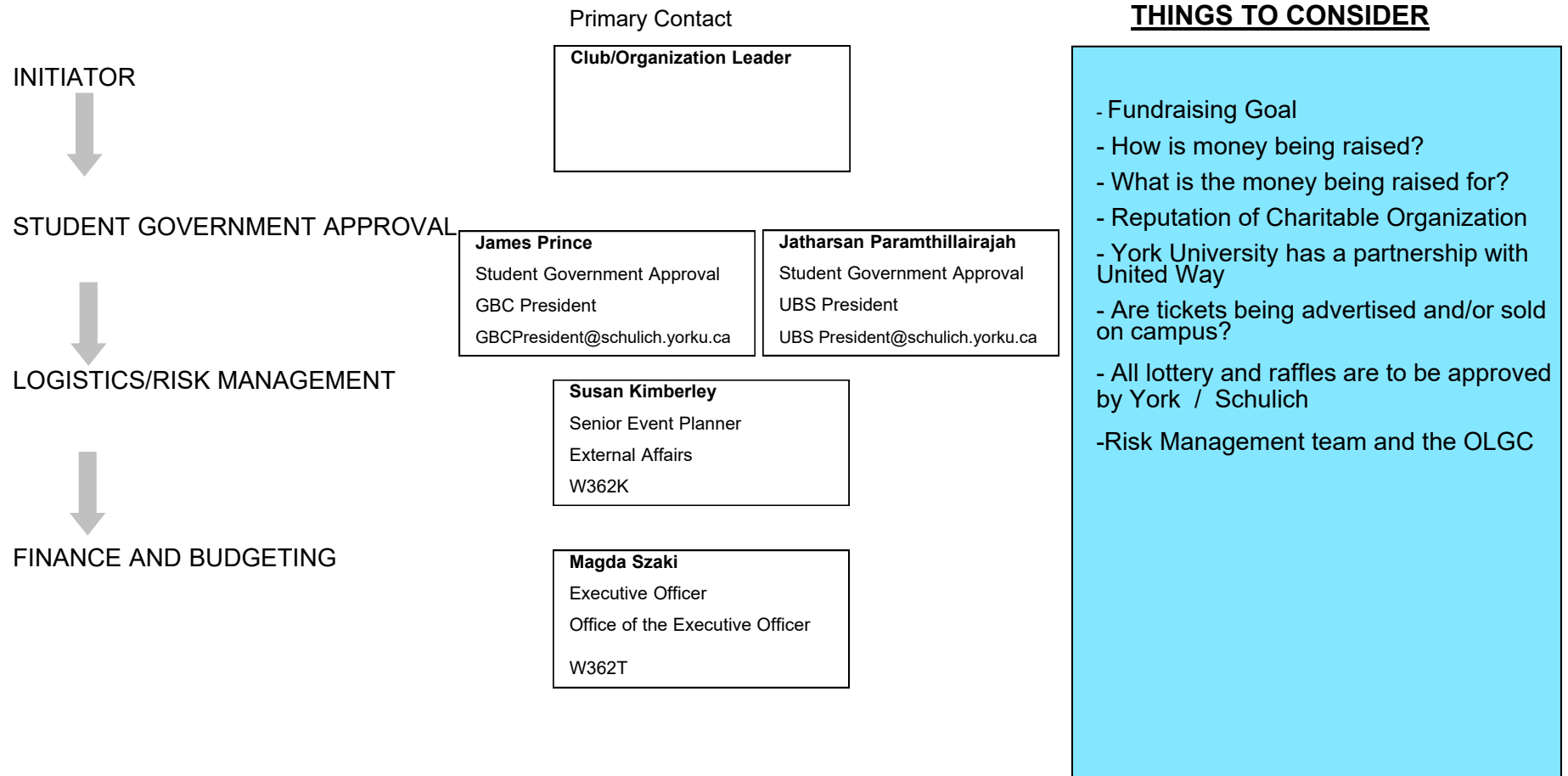


EVENT PROPOSAL FORM: PROCESS FLOW CHART

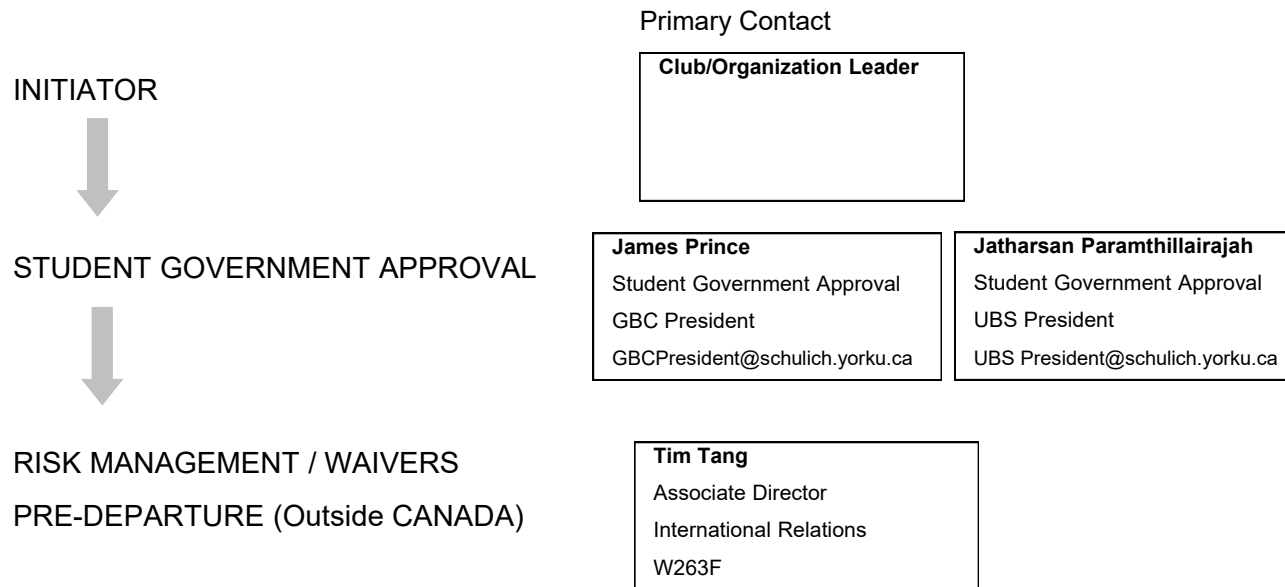
THINGS TO CONSIDER

- Assess Scope of Event
- Assess possible cost of event
- Assess timing and duration of event
- Internal or External Event?
- Event Sponsorship
- Approves Event on behalf of students
- Will the event conflict with other activities?
- Event Feasibility
- Fixed Costs/Variable Costs
- CDC Support/Partnership
- Will the proposed event conflict with another CDC/Club event?
- Booking of Classrooms/Breakout Rooms
- Intellectual Property: Schulich logo cannot be changed or edited.
- Purchasing Guidelines: Goods and services portraying the Schulich/York logo must be purchased from a York University Supplier
- Permission to Sell Tickets: Club ticket sales are done at the south entrance on the first floor. Contact Susan Kimberley to book your spot.
- Money Safety: To ensure your safety keep your money box discretely out of sight when tabling your ticket sales.
- Event Logistics
- Facilities/Resources (auditorium?)
- A/V Orders, Technology
- Food and Beverage
- Risk Management Issues

RAFFLES/LOTTERIES/CHARITY EVENTS: PROCESS FLOW CHART



EXCURSIONS / CASE COMPETITIONS / TRIPS: PROCESS FLOW CHART



THINGS TO CONSIDER

- Is this an official Schulich/GBC/Student club Event?
- Is it being advertised on campus?
- Are tickets being sold on campus?
- Who is organizing the trip?
- Is a bus/boat/plane being chartered?
- **Is there \$10 million liability insurance covered?**
- Have all participants signed a waiver provided by Student Services?
- **PRE-DEPARTURE COMPLETED? (International or US)**
- Is there an emergency contact list for each participant? Waivers?
- **Have we met all requirements and addressed concerns of York University Risk Management?**

MAIL ROOM – OFFICE SERVICES

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CLUB OFFICE KEYS/BANK AUTHORIZATION LETTERS

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W362S x77891/55071

Important Dates

- **WEEK OF JUNE 1: Financial Responsibilities of the outgoing Executives**
- **WEEK OF JULY 1: Clubs shall provide a full list of all elected club officials**
- **WEEK OF JULY 1: the club's faculty/CDC advisor with contact coordinates**
- **WEEK OF JULY 1: Financial and Organizational Responsibilities of the incoming Executives**

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Dezső Horváth

Dean

Office of the Dean

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Report on Business

U of T MBA graduation party takes an 'embarrassing' turn

Offensive remarks, behaviour at Grad Ball prompt apologies from faculty, students

Paul Waidie

From Friday's Globe and Mail Published on Thursday, Apr. 01, 2010 11:22PM EDT Last updated on Friday, Apr. 02, 2010 8:26AM EDT

Apologies are flying at the University of Toronto's Rotman [School of Management](#) after "embarrassing" events at a recent graduation party.

Rotman is considered one of the top [business schools](#) in Canada and the event, called Grad Ball, is held every spring to celebrate MBA graduates. This year's ball was last Friday and it was attended by about 300 students, faculty, staff and spouses.

The party is organized by students and it typically includes an open bar and roast-like presentations, where students poke fun at professors and the school.

Sources say some students swore, appeared drunk and made rude comments during skits about the "Top 5 reasons to attend Rotman." Some attendees were also offended by the introductory remarks of Rick Powers, an associate dean who is executive director of the MBA program.

This week Roger Martin, the school's dean, sent a sharply worded e-mail to faculty, students and staff saying he was "saddened and embarrassed" by the event.

"In particular, the words uttered suggested an attitude towards women and sexuality that was offensive and demeaning. There is no excuse for this behaviour. It is not a case of 'boys being boys,' youthful exuberance or mere drunkenness," Mr. Martin wrote.

He added that he was "disappointed with the opening remarks of associate dean Rick Powers. I think that the innuendo behind Rick's remarks caused discomfort and didn't set the right tone for the evening."

Mr. Powers promptly issued an apology.

"Although I did not intend to offend anyone or to set an inappropriate tone, clearly I did and for that I am truly sorry and disappointed in myself," he wrote in a e-mail to students, faculty and staff.

"It is critical to our reputation and to the community that we want to build that we treat everyone with respect and that our actions do not make anyone feel uncomfortable. Beyond the reputational issues this is something that I believe in personally which is why I feel so badly that I have let you down."

One more apology came from Rachel Megitt, an MBA student who is president of the Graduate Business Council that organized the party.



SPONSORSHIP 101 SEMINAR

Open for all Undergraduate and Graduate Schulich Clubs

WHEN: Saturday, June 9 - 9:30am to 12:00pm or Wednesday, June 13 - 5:45pm to 8:00pm

WHERE: Schulich School of Business, Room TBD

WHY?

- ✓ Training and guidance on effective sponsorship
- ✓ Learn best practices on engaging prospective sponsors
- ✓ Build your sponsorship network

RSVP at <https://bit.ly/2rGdbdl>

Or email: gbccorporate@schulich.yorku.ca / corporateubs@schulich.yorku.ca

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Manager, Industry Advising

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x22057

Career Development Centre – Industry Specific Contacts:

Accounting Advisor – TBD (Minoo Bhutani – temporary)

Consulting Advisor - Peggy Steele

Finance Advisor - Victoria Cabral

Marketing & Sales Advisor - Elana Markus

Operations & Technology Advisor - Bonnie Wong

Industry Manager, Advising - Mark Freedman

Financial Transparency

May 2018

Financial Transparency

- **Financial Responsibilities of the Outgoing Executive**
 - **Use the checklist:** <http://ada.schulich.yorku.ca/student-room-booking/>
 - **Final Profit and Loss Statement for 17-18**
 - Budget and Actual – follow template
 - As at April 30, 2018, reconciled to opening and closing bank balance
 - A bank reconciliation, if required. Plan ahead
 - Copies of all bank statements from May 1, 2017 to April 30, 2018
 - Submit printed copies of all to the Senior Financial Officer (or appointee) and follow up for confirmation that information is complete.
 - Advise the Incoming Executive that the above is done and approval is pending and transition any files to them.

Outgoing Checklist 2017-2018

PLEASE SUBMIT IN HARD COPY ONLY TO W362					
Club Name in Full & Club Category [UG, G, Both or Affiliate]					
Final Profit and Loss statement for 2016-2017 in proper format Budget/Actual/Variance as at April 30th with Opening and Closing bank balance					
Bank reconciliation, if required					
Copies of all bank (including Paypal, EventBrite, and Tilt, if applicable) statements with account balances from May 1, 2016 to May 31, 2017 in support of #1 & #2					
Club Sign Offs					
Print Name & Title of <u>Outgoing</u> Executive Member		Date	Submitted		
Email	Phone	Number			
Print Name & Title of <u>Incoming</u> Executive Member					
Email					
SSB Approval Sign offs					
First Reviewer		Date			
Cindy Zhuang, Financial Officer, Office of the Executive Officer, SSB Ext. 44309		Date			
Date of Approval Email		Initials			

Sample Financial Statement

CLUB NAME [G/UG]				
FINANCIAL STATEMENT - BUDGET VS ACTUAL				
FOR YEAR ENDED APRIL 30, 201X				
Profit and Loss Statement				
	BUDGET	ACTUAL	BUDGET	
	2015-2016	2015-2016	2016-2017	2016-2017 Budget Notes
REVENUE				
MEMBERSHIP FEES	\$ 500.00	\$ 600.00	\$ 600.00	(# of members x \$ fee)
SPONSORSHIPS	200.00	200.00	200.00	
GBC/UBC FUNDING	100.00	-	-	
EVENT ONE	300.00	400.00	500.00	
EVENT TWO	300.00	500.00	600.00	
INTEREST	-	0.11	-	
TOTAL	\$ 1,400.00	\$ 1,700.11	\$ 1,900.00	
EXPENSES				
EVENT ONE	\$ 200.00	\$ 233.65	\$ 300.00	CHQ # XX
EVENT TWO	200.00	535.90	600.00	CHQ #XX, XX
CLUB FAIR	100.00	50.00	50.00	CHQ#XX
BANK CHARGES	45.00	21.00	20.00	FROM BK STMTS
ADMINISTRATION	20.00	36.20	40.00	CHQ#XX
TOTAL	\$ 565.00	\$ 876.75	\$ 1,010.00	
NET CONTRIBUTION (DEFICIT) FOR THE YEAR	\$ 835.00	\$ 823.36	\$ 890.00	
Balance Sheet				
OPENING BALANCE	\$ 100.00	\$ 100.00	\$ 923.36	
NET CONTRIBUTION (DEFICIT) FOR THE YEAR	\$ 835.00	\$ 823.36	\$ 890.00	
CLOSING BALANCE	\$ 935.00	\$ 923.36	\$ 1,813.36	
CLOSING BALANCE CONSISTS OF:				
BALANCE PER THE BANK		700.00		
ADD: OUTSTANDING DEPOSITS		400.00		DEPOSITED TO BANK (DATE)
DEDUCT: OUTSTANDING CHEQUE (LISTED)		(100.00)		CHQ# XX & DATE ISSUED B4 APRIL 30
ADJUSTED BANK		1,000.00		
LESS: ACCOUNT PAYABLE		(76.64)		CHQ#XX & DATE ISSUED AFTER APRIL 30
CLOSING BALANCE		923.36		
THINGS TO REMEMBER				
1. ALL FUNDS RECEIVED (INCLUDING CASH) ARE DEPOSITED INTO BANK ACCOUNT.				
2. CHEQUES ARE WRITTEN TO PAY EXPENSES. (SEE #4) NO PETTY CASH				
3. NO USE OF CLUB DEBIT CARD TO PAY FOR EXPENSES.				
4. NO CASH WITHDRAWALS FROM THE BANK ACCOUNT. IF VENDOR WILL NOT ACCEPT A CLUB CHEQUE, AN EXECUTIVE MEMBER WILL PAY BY PERSONAL DEBIT OR CREDIT CARD AND SUBMIT AN EXPENSE CLAIM WITH RECEIPTS FOR REIMBURSEMENT.				
5. THERE MUST BE THREE CHEQUE SIGNERS ON THE BANK ACCOUNT. TWO CHEQUE SIGNERS ON ANY CHEQUE.				
6. OBTAIN COPIES OF ALL CANCELLED CHEQUES. (BOTH FRONT AND BACK)				
7. TRANSFER ALL PAYPAL OR TILT BALANCES PRIOR TO APRIL 30, 201X				
8. UNDERSTAND WHEN IT IS ACCEPTABLE TO USE A "FLOAT" FOR EVENTS.				

Financial Transparency

- **Financial Responsibilities of the Incoming Executive**
 - Follow up with Outgoing Executive that prior year financial responsibilities have been met.
 - Do not wait for outgoing approval to submit your package. Use the copy of the 2018-2019 financial P & L provided to you. (This may be updated later once the statement is approved.)
 - If the Outgoing Executive provides an email contact on their checklist, your club will be advised when the outgoing financial package has been approved. Your package cannot be approved until the outgoing is approved.

Incoming Checklist 2018-2019

2018-2019			
Incoming Club Checklist			
Deadline July 1			
PLEASE SUBMIT IN HARD COPY ONLY TO W362			
Club Name in Full & Club Category [UG, G, Both or Affiliate]			
1	Prior year financial statements have been approved by Senior Financial Officer or Financial Officer [Date: _____] (if not approved, complete Items 2 - 8 and submit package)		
2	Full list of newly elected club officials with contact co-ordinates.		
3	Name of Faculty Advisor _____		
4	Draft <u>Signed</u> Letter of Authorization to release banking records (this will provide details of Bank, Bank Address, Account Number and proposed signing authorities). Use template on Schulich website.		
5	The budget for the current year May 1, 2017 to April 30, 2018 with anticipated dates for all events.		
6	Anticipated offsite events regardless of size (can be noted on budget, separate reporting not required).		
7	Detailed budgets for any proposed major event >500.00 (if applicable).		
8	Updated club mandate/constitution.		
Club Sign Offs			
Print Name & Title of Incoming Executive Member		Date	Submitted
Email		Phone	Number
SSB Approval Sign offs			
1 - 8 above is complete.			
First Reviewer		Date	
Cindy Zhuang, Financial Officer, Office of the Executive Officer, SSB Ext. 443		Date	
<input type="checkbox"/> Final Signed Letter of Authorization Received OR			
<input type="checkbox"/> Confirmation that Signing Authorities Have Changed		Date	
Date of Final Approval Email		Initials	

Financial Transparency

- **Financial Responsibilities of the Incoming Executive**

- **Use the checklist:** <http://ada.schulich.yorku.ca/student-room-booking/>
- Full list of elected club officials with contact co-ordinates
- Name of Faculty or CDC advisor. Write it on the checklist
- Draft signed Letter of Authorization to release banking records.
 - Use template provided. This provides bank account information (bank name, address, account number, and proposed new signing authorities).
 - Only used under extraordinary circumstances.

Letter of Authorization Template

CLUB LETTERHEAD

Bank Name
Bank Address
Bank Address

Date

To whom it may concern,

The current signing officers for **CLUB NAME**, bank account # **XXXX-XXX**, are **NAME SIGNING OFFICERS**. The purpose of this letter is to give permission and authorization to the Senior Financial Officer or the Financial Officer at the Schulich School of Business York University (SSB), access to our financial records under extraordinary circumstances. This can be for instance; the departure of the club's signing officers from the organization without submitting proper year end financials to the SSB.

Sincerely,

Signing Officers

SIGNATURE HERE

Name
Email
Telephone

SIGNATURE HERE

Name
Email
Telephone

SIGNATURE HERE

Name
Email
Telephone

Financial Transparency

- **Financial Responsibilities of the Incoming Executive**

- Budget for May 1, 2018 to April 30, 2019
 - Use template – FINAL Last year budget, FINAL last year actual, this year budget. If outgoing is in wrong format, use required
 - Use correct opening bank balance as per 2017-2018 financials
- Detailed budget and anticipated dates for any major event >\$500
 - Make sure this agrees to your summary budget
- Disclose any anticipated offsite events regardless of size
 - Look to S. Kimberley, Senior Event Planner for guidance
- An updated copy of the club's constitution and/or mandate
 - Proofread! Make sure it has in fact been updated.

Financial Transparency

- **Financial Responsibilities of the Incoming Executive**

- If a letter to your bank is required in order to change signing authorities, this letter will not be executed until 2017-2018 outgoing executive responsibilities are approved. **Approvals are on a first come first serve basis.**
- Once incoming financial package approval is received, contact Sabine Friedrich. She will confirm with her records that the Incoming Financial Package for 2018-2019 has been approved. She will respond to you with her list of requirements in order to draft the letter. She will arrange to have it signed and will contact you when ready for pick up.
- Take letter to bank and change signing authorities
- Sign your letter of authorization and drop it off to Finance

Other Stuff

- E-mail headers
 - Include - club name and status [ie: Graduate Club (G), Undergraduate Club (UG), Combined (G & UG), or Affiliate (A)]
 - Indicate either “Outgoing Club Package” or “Incoming Club Package”
- Make sure all documents
 - Have your club name
 - Are reviewed and updated before submission
- Do not blindly follow the past, use provided templates
- If you have questions, contact Cindy Zhuang (czhuang@schulich.yorku.ca) at 44309.