

# Schulich Policy on the Responsibilities of Schulich Student Organizations

## General Principles

[1] Schulich based student councils (GBC and UBC) and the student clubs that are 'chartered' by the respective councils (UBC, GBC) are covered by this policy. The School's role is to provide oversight and ensure accountability of the clubs. This oversight includes support to the student councils in the establishment of new clubs, final approval of any new club upon recommendation by the student council, and the suspension of clubs that do not comply with the policies set out in this document.

[2] The student councils monitor the activities of all clubs chartered by them. The School grants or denies the use of School resources and its name to a student organization. Resources include (but are not limited to) office space, event space in the Schulich building, support and facilitation of events, case-by-case one-time funding, in return for compliance with the policies and procedures that govern the student councils and clubs.

[3] The school's body involved in oversight of student clubs is referred to as the Schulich Club Advisory Committee and includes the following members:

- Chief of Staff, Dean's Office
- Director, CDC
- Senior Financial Officer
- Senior Event Planner

The Associate Dean Academic will serve to break ties in votes and as an adjudicating body in the case of appeals or disputes.

In short, the clubs have two 'masters': their 'parent' organization (UBC or GBC) with whatever chartering obligations are set out in the Council constitutions, and the transparency / procedural / conduct expectations of the School. (NOTE: There are three established student organizations in which there is substantial Schulich membership: AISEC, Net Impact and JD/MBA. The School facilitates their activities, but the financial oversight arrangements are not the same as for Schulich-based clubs.)

## School Regulations:

1. **Composition:** To be a Schulich-based club and in order to have access to School resources, *all* club members elected to leadership positions must be enrolled in Schulich degree programs during their full term of office, and at least 80% of the membership should also be Schulich degree program students.
2. **Financial and organizational transparency:** Clubs shall submit the names of the President and VP Finance at the end of Week 10 of the Winter semester to the Dean's Chief of Staff (Sean Siddik). Additional information is required later (see Appendix 1 for details), including the name of a **Faculty or CDC advisor**. Each club is *required* to have a Faculty or CDC advisor. The advisor's role is to provide subject-based support to the club and ensure continuity in the club's leadership over time. Clubs also must comply with the Financial Transparency rules outlined in the Appendix 1.

3. **Event organization:** Schulich-based student councils and clubs are *required* to use the event proposal procedures as set out in the Schulich School of Business Policy on Student-Organized Event in Appendix 2 when organizing club activities. In particular this includes:
  - Explicit acknowledgement that any event that is promoted as a club-based event (**or** any event that could be reasonably inferred to be a Schulich student council or student club event from the way that it is publicized) will be subject to the event organization regulations. (An explicit acknowledgement of this requirement will be required at the beginning of each new club executive's term.)
  - Prior disclosure by each club of all activities planned under its auspices
  - Use of on-campus venues for club events unless there are exceptional or unavoidable reasons for having events off-campus
  - Compliance with risk/responsibility protocols, including assuring appropriate insurance coverage from external providers
  - Completed event proposal forms must be submitted to the Senior Event Planner according to the schedule laid out in the Policy on Student-Organized Events):
    - For whole day events of events that occur off campus: 3 months before the event date
    - For other events with a budget exceeding \$500: 1 month before the event date
    - For all other events: 2 weeks before the event date
4. **Conduct:** Improper conduct (as defined by Student Code of Conduct or these policies) for which the club was responsible or which occurred because of the club's failure to act in a reasonably prudent fashion would be grounds for reduction or suspension of School support for the club in question.
5. **Activities:** Clubs that have become inactive (as defined by the occurrence of events) for more than 6 months, clubs not in good standing with the student council or Advisory Committee and clubs without a faculty or CDC advisor will be suspended and have to re-apply to the student government if they wish to continue operating.

## Appendix 1

### Schulich School of Business Financial Transparency

Clubs shall provide the following information relating to its finances and activities to the Senior Financial Officer or his/her appointee. The club executive completing the following step(s) will usually be the person in charge of the club's finances (e.g., VP Finance, Treasurer, or similar).

Note: the information as detailed below may or may not be the same as what is required by UBC and/or GBC. **Unless otherwise noted, print all items, complete and sign the checklist (use provided template) and deliver to Bill King or Tina Anderson (Room W362BB).**

#### **a) Financial Responsibilities of the outgoing Executives – deadline June 1**

- A final Profit and Loss Statement for the previous year in the proper format, i.e., Budget to Actual, as at April 30, of this year, properly closed with revenue and expense accruals if necessary, reconciled to the opening and closing bank balance.
- A bank reconciliation, if required.
- Copies of all bank statements to support the profit and loss statement transactions for the year, the closing bank balance and the bank statement for the month of May to verify outstanding items (if applicable).
- Follow up with Finance and confirm your information is complete and verified.
- Advise the incoming executive that closing financials are completed and transition any files.

#### **b) Financial and Organizational Responsibilities of the incoming Executives – deadline July 1**

- Confirm with outgoing executive that prior year financial responsibilities have been fulfilled.
- Change signing authorities (3) from old executive to new executive. If a letter from the Dean is required by the club's bank, please contact Sabine Friedrich.
- Full list of newly elected club officials with contact information.
- Name of the club's Faculty or CDC Advisor.
- In addition to the paper copy to Bill King/Tina Anderson, clubs must send an e-mail containing (a) the full list of newly elected club officials with contact information and (b) the club's Faculty or CDC Advisor, to the Dean's Chief of Staff at [ssiddik@schulich.yorku.ca](mailto:ssiddik@schulich.yorku.ca).
- Bank account information, bank name, bank address, account number and proposed signing authorities.
- Letter of Authorization to release banking records. This authority will be used only under extraordinary circumstances. Use the provided template, signed by all three signing authorities.
- The budget for May 1 of this year to April 30, next year in the proper format, i.e., last year's budget, last year's actual, this year's budget. Use correct opening bank balance.
- Detailed budgets and anticipated dates for any major event >\$500.
- Any anticipated offsite events regardless of size. Please consult Susan Kimberley, Senior Event Planner, for guidance.
- An updated copy of the club's constitution and/or mandate.

The above information will be reviewed. If complete and the prior year financials have also been received from the outgoing executive and approved, the club's President and VP Finance will be notified that the club has been approved for financial transparency and club events. If no email is received by September 1 of this year, please follow up with Bill King to determine your status.

## Appendix 2

### Schulich School of Business Policy on Student-Organized Events

*(Please note: These policies have been established by the Schulich School in collaboration with the Graduate Business Council and the Undergraduate Business Council. Clubs or other student organizations that ignore or attempt to circumvent the procedures outlined below are subject to sanctions that may include loss of room booking privileges, event cancellations, or [in the most serious circumstances] loss of club status.)*

#### OVERVIEW

All events that are run by Schulich-based student organizations must comply with the following policies in order to have access to space and other resources at the School. The School wishes to encourage student organizations to organize events that enrich the student experience in Schulich programs. The School also needs to assure that such events are financially sound and that the other resources that such events draw upon including space, equipment and external stakeholders are appropriately engaged.

There are many informal spaces for students to gather in the building for spontaneous discussions and general conversation. There are also occasions when clubs will want to use classroom space or other dedicated spaces for club activities. In general, the School will assist the clubs in finding appropriate space for their activities. However, because of the number of clubs and activities, rules and procedures do need to be observed so that an orderly and equitable use of our 'bookable' space can be achieved.

Please Note: Space will be made available to student organizations on a space-available basis. Student organizations are expected

- ➔ to rigorously respect the beginning and end times, and
- ➔ to leave the room ready for use by its next occupants (typically, a class) by erasing boards, by picking up and properly discarding any refuse, and by making sure chairs or other items moved for the event are returned to their proper location.

Only the club president or a permanent "designate" from the club, named by the club president, will be allowed to initiate a request for a club gathering.

There are two general kinds of student-organized gatherings for which space will be provided.

1. "Meetings"
2. "Events"

#### Distinctions between 'meetings' and 'events'

- ➔ The distinction between these is that '**events**' involve one or more of the following: [1] external participants [speakers, panelists] and [2] non-trivial costs, [3] catering services and/or [4] any use of non-classroom spaces (auditorium, Marketplace, lounges, etc.).

In contrast, '**meetings**' involve only students (and sometimes Schulich faculty), but do not involve outside participants.

- If a club activity involves catering or is bringing in any outside participants (speakers, students from other schools, etc.), it **is** an 'event' ... student organizations should use the 'event' procedures described later in this document, not the meeting procedures immediately below.

## **[1] MEETINGS**

### **The 'drill' for booking a club meeting space**

#### **1.1. Where should meetings be held?**

Meetings with 10 or fewer people (e.g., most club executive meetings) should be held in W036A, the club meeting room near the club offices, if that room is available. Please contact [roomrequest@schulich.yorku.ca](mailto:roomrequest@schulich.yorku.ca) to determine the availability of that room. If W036A is not available or the expected number of participants exceeds 10, a request for a breakout room or classroom space should be made using the procedures outlined below.

#### **1.2. Who can request a classroom for club meeting purposes?**

Only official student clubs can book classroom space for club meetings. Ad hoc groups of students are not eligible to make such a request. (The exception would be a group that was attempting to organize a new club ... space will be booked on a one-time basis if the council president [UBC or GBC] endorses the request.)

There are two student councils, the Graduate Student Council (GBC) and the Undergraduate Student Council (UBC). Each council is required to forward a complete list of clubs and this year's club executives to the office of the Associate Dean Academic (attn. Nicola Jagdeosingh). Only the club president or a permanent "designate" from the club, named by the club president, will be allowed to book classroom space for club meetings. (Space is limited and this requirement assures us that only authorized requests to book a space are being submitted and processed.)

In addition, there are three York clubs with extensive Schulich student membership who are eligible to request meeting space. They are AISEC, MBA/JD and Net Impact. They should identify their presidents to the ADA's office so that room bookings can be made. Again, only the presidents or permanent "designates" can make a room-booking request for a meeting.

#### **1.3. How should a request be made?**

- Requests **must** be made from the NOTES email account of the person identified as the president of the club. (This assures the ADA's office that the request is actually from the person who has been identified as the head to the student organization involved.)
- The email address is [roomrequest@schulich.yorku.ca](mailto:roomrequest@schulich.yorku.ca).

The **subject line** of the email should include the name of the student organization and the DATE for which space is being requested.

The **body** of the email should include:

- the name of the student organization
- the date for which the space is requested

- the start and end times for the meeting (normally, bookings will not be made for more than 1.5 hours)
- the anticipated number of people expected to be present
- the name and full contact information (including phone #) for the requester

#### 1.4. **When should requests be made?**

Club meeting spaces may be booked in advance, but advanced bookings will be limited to one meeting per month. If there is a need for additional meetings, each occasion will require a separate reservation. ("Standing" meeting reservations for the student councils [UBC, GBC] may be made more frequently, if needed.)

Please note: Every attempt will be made to honor classroom reservations club meetings. However, academic use of classrooms takes precedence and where other solutions are not available, a meeting reservation may be moved or cancelled to accommodate a required academic use.

For **events**, completed event proposal forms must be submitted to the Senior Event Planner according to the schedule laid out in the Policy on Student-Organized Events):

- For whole day events of events that occur off campus: 3 months before the event date
- For other events with a budget exceeding \$500: 1 month before the event date
- For all other events: 2 weeks before the event date

See Section 2 for additional information on initiating **events**.

#### 1.5. **What about food?**

- ➔ Students attending meetings in classrooms are allowed (as they are in classes, also) to bring water, coffee or juice with them. We urge students to be careful to avoid spills.
- ➔ Catering is not available for club meetings held in classrooms.
- ➔ Personal food (e.g., soup, sandwiches and so forth) are NOT allowed in the classrooms.

A club that does not enforce these expectations in its meetings may lose its classroom use privileges.

#### 1.6. **What about AV equipment?**

Access to the in-room AV equipment is protected by access code to be used by faculty and staff, only. Therefore, for meetings, there will be no 'free' access to this equipment. If a student organization needs A/V equipment for their meeting, they should indicate that in their room reservation request. The student group will directed to work directly with Aramark when their space is confirmed. Payments for A/V charges are made to Aramark.

## **[2] Events**

The following policies apply to 'events', which by definition are gatherings that include one or more of the following: [a] external speakers or presenters, [b] non-trivial financial costs, [c] catering services and/or [d] the use of one or more large venues in the Schulich School (McEwen Auditorium, ELC Dining Room, Marketplace, Courtyard, 2<sup>nd</sup> or 3rd floor Lounges, N109, E111).

Please note that **case competitions outside of Schulich** do not qualify as events in this category. Please directly approach the Chief of Staff, Dean's Office (Sean Siddik) if you are contemplating such an event.

1. Student clubs within Schulich are 'chartered' by the two business councils – the Undergraduate Business Council (UBC) and/or the Graduate Business Council (GBC).
  - These councils are the recognized student organization entities within the University and are the vehicles through which student fees dedicated to student organizations flow through to the various club entities. Because of these Council responsibilities, the UBC and the GBC will serve in an advisory capacity to the Schulich School with respect to approval of event proposals. The screening of event proposals by the GBC or the UBC reduces the need to the School's administration to become overly involved in deciding what kinds of events are of interest to students.
  - Generally the Councils will be expected to check the suitability of proposed events and to assure that a clearly articulated plan has been submitted. The Councils are expected to take a positive stance toward proposals from student organizations except when their judgement is that the event is *not* appropriate or that the proposal is not sufficiently clear or detailed to be evaluated.
  - However the Councils may apply a higher or different standard to their decisions about whether or not they wish to contribute Council-controlled funds to any particular proposed event.
2. Once an event has initial approval (approval in principle) from the UBC or GBC, a full event proposal should be forwarded to the Senior Event Planner (Room W362K) for review. For instances where the EPF is not initiated by the club presidents, clubs are advised to name a permanent "designate" from the club to oversee all EPFs. Once the completed EPF has been forwarded to the Senior Event Planner, she will indicate what other approvals will be necessary. Typically, the following groups will need to review and endorse the event before it can be formally mounted.
  - Budget approvals: If the event will involve the expenditure of non-trivial amounts of money (say, more than \$500), a budget that indicates the source of funds, the use of funds and the record-keeping regime for all monies involved shall be presented to the Office of the Dean, with a copy to the respective Council. (Because the School can easily become the payer of last resort for events in deficit), it needs to be confident that events that bear the School's name are financially sound.
  - Event Planning and Logistics: If the event will use any of the School's large or public venues [McEwen Auditorium, ELC Dining Room, Marketplace, Courtyard, 2<sup>nd</sup> or 3rd floor Lounges, N109, E111], availability and charges (if any) for those spaces should be arranged through Susan Kimberley. Similarly, catering and special equipment requirements should be identified and arranged. (NOTE: If the event will require use of "catering allowed" classrooms or

breakout rooms, a preliminary request should be made to the ADA's staff to determine whether such space is likely to be available at the proposed times/dates. This preliminary request must be made by the president of the club.)

- Speakers and Sponsors: If the event involves approaching speakers or sponsors, the list of those to be approached must be reviewed with the Career Centre or with the Development and Alumni Relations unit. Generally this should be done before the outside speaker is approached. However, in cases where an outside organization has initiated or organized the speaker, this step should be one of informing those two units.

The purpose of this review is two-fold: [a] to assure the appropriateness of those to be approached and coordinate the School's interaction with those organizations, and [b] to use the Career Development Centre and the Division of Development and Alumni Relations as the source of suggested potential additional or alternative speakers and sponsors. In general, the School encourages student initiative in finding good speakers and helpful sponsors, but does need to be aware of who is being asked to support the School because of the School's complex relationship with this set of stakeholders.

**Please note the following regulations and requirements:**

1. Lotteries / Raffles, and Charity Events: The City of Toronto requires that an application for permission to conduct such fund-raising activities.
2. Excursions / Field Trips
  - Any student club or council sponsored event that involves students leaving the campus must be reviewed and approved by the Senior Event Planner (Susan Kimberley) for domestic events or the Associate Director of International Relations (Lindsay Hillcoat) in the Student Services and International Relations Office for international events.
  - Schulich staff will review the diligence responsibilities of the organizers as part of the event planning process.
  - All participants must sign and organizers must submit signed waiver forms prior to the off-campus event.
  - If a public carrier (e.g., a bus company) is to transport students to a venue off campus, the university requires certain minimum liability insurance coverage. Documentation or other specified confirmation of that insurance is required before the event.
  - Out-of-town events require the presence of one or more York University representatives.