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# SOME USEFUL INFORMATION: CONTACTS AND PROCEDURES

*PRESENTATION TO THE GBC, UBC  
& STUDENT CLUBS AND ORGANIZATIONS*

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  
Kalos Orisate Chàò mung Maeva Laipni Ludzam  
Bienvenido **Welcome** Bienvenue  
Swaagatam Dobro došli Willkommen  
Biin Dig Gain Welkom Amkela Bitaemo  
Bruchim habayim Aloha Mai Merhaba  
lorana Dobrodoshli Ulsten Hozta  
Hue Ying Benvenuto Selamat Datang  
Oso oseyo Willkumm  
Bruchim Habayim (Habaim) Irashaimaisu

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## **CLUB EXECUTIVE TEAM TRANSITIONS**

### **FINANCIAL TRANSPARENCY**

- RESPONSABILITIES OF OUTGOING EXECS
- RESPONSABILITIES OF INCOMING EXECS

### **PROCESS AND PROCEDURES**

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

### **MAIL ROOM – OFFICE SERVICES**

### **CLUB OFFICE KEYS**

### **KEY CONTACTS**

### **QUESTIONS**

# Financial Transparency

March 2017

# Financial Transparency

- **Financial Responsibilities of the Outgoing Executive**
  - Use the checklist.
  - **Final Profit and Loss Statement for 16-17**
    - Budget and Actual – follow template
    - As at April 30, 2017, reconciled to opening and closing bank balance
    - A bank reconciliation, if required. Plan ahead
    - Copies of all bank statements from May 1, 2016 to April 30, 2017
  - 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.

# Financial Transparency

- **Financial Responsibilities of the Incoming Executive**
  - Follow up with Outgoing Executive that prior year financial responsibilities have been met and receive any files.
  - Do not wait for outgoing approval to submit your package. Use the copy of the 2016-2017 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.

# Financial Transparency

- **Financial Responsibilities of the Incoming Executive**
  - **Use the checklist.**
  - Full list of elected club officials with contact co-ordinates
  - Name of Faculty or CDC advisor. Write it on the checklist
  - Draft 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.

# Financial Transparency

- **Financial Responsibilities of the Incoming Executive**
  - Budget for May 1, 2017 to April 30, 2018
    - 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 2016-2017 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 2016-2017 outgoing executive responsibilities are approved. **Approvals are on a first come first serve basis.**
  - Once outgoing financial package approval is received, contact Sabine Friedrich. She will confirm with her records that the Outgoing Financial Package for 2016-2017 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 me at 44309. We are here to help. 😊

REVISED  
EPF  
May 26 2015

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



**EVENT PROPOSAL FORM**  
Schulich School of Business  
Student Clubs

Initiator: \_\_\_\_\_ Club President: \_\_\_\_\_  
 Club/Organization/UBS/GBC: \_\_\_\_\_  
 Email: \_\_\_\_\_ Phone Number: \_\_\_\_\_ Date: \_\_\_\_\_  
 Club Advisor (Faculty/CDC Advisor): \_\_\_\_\_

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

**RESOURCES:** (Check all that apply)

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

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) \_\_\_\_\_

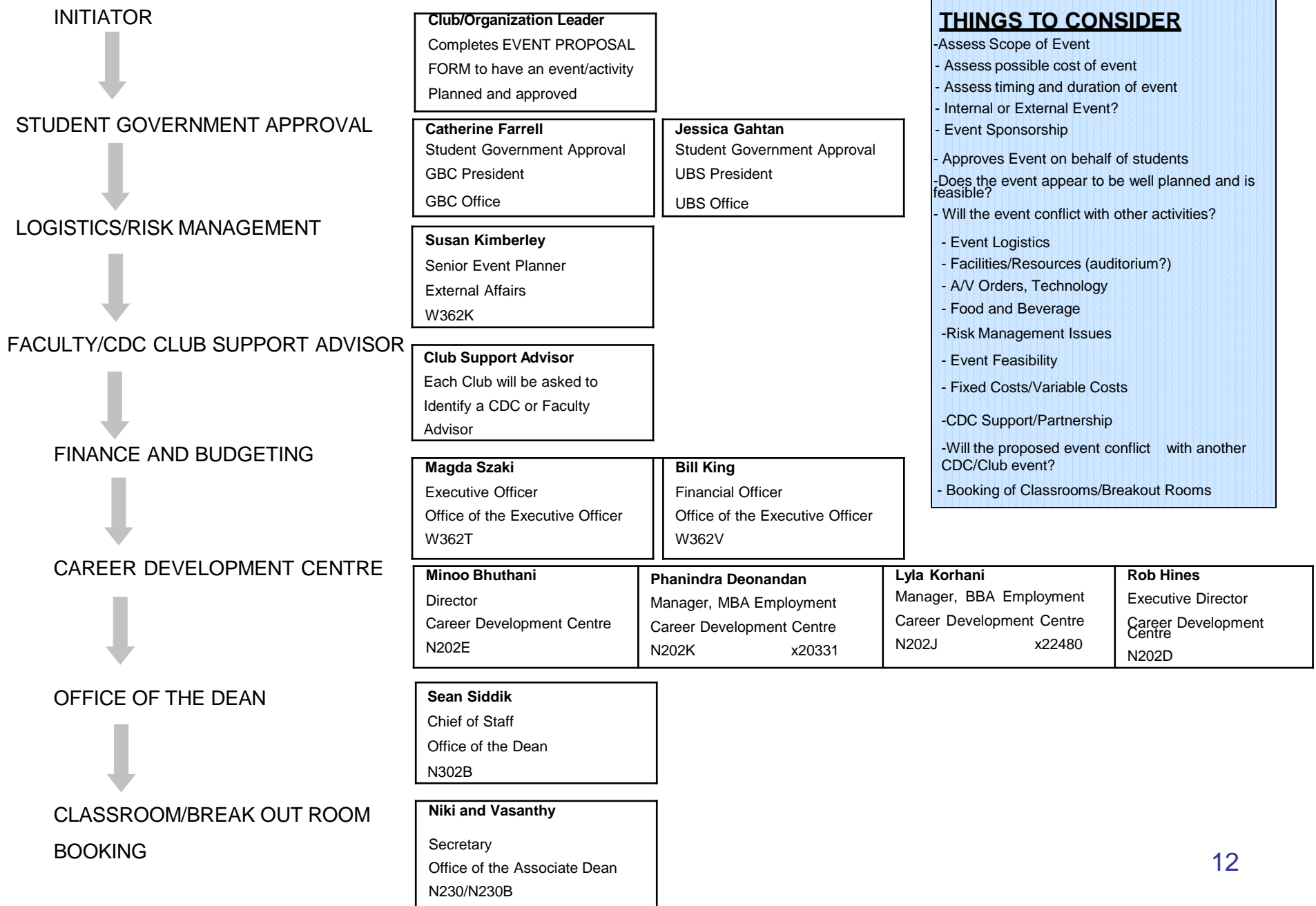
Sequence	Approver Name	Proposal Approved (Signature/Initials)	Date	Comments Attached?
1. Sanction from Student Body GBC W140B, UBS W140C				
2. Event Planning & Logistics (Susan Kimberley W362K)				

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 Lyta Korhani)				
5. Dean's Office (Sean Siddik, N302G)				

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

Revised: May 2015

# EVENT PROPOSAL FORM: PROCESS FLOW CHART

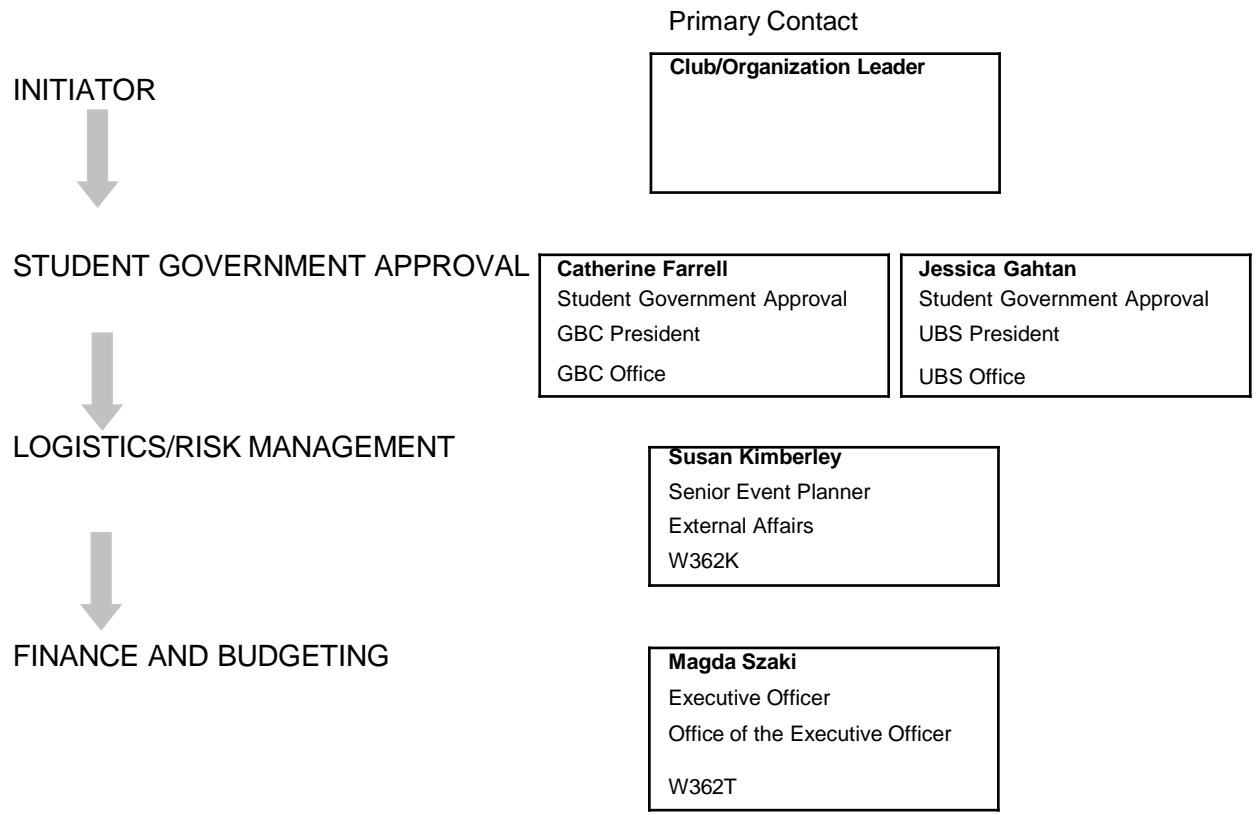


## **EVENT PROPOSAL FORM: PROCESS FLOW CHART**

### **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

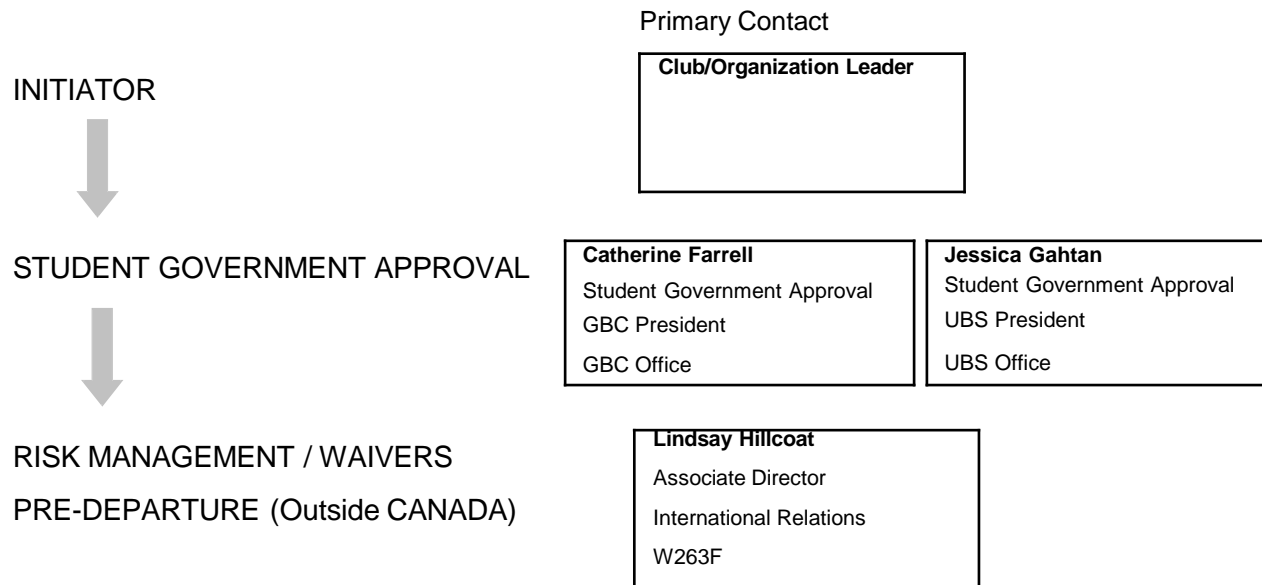
# RAFFLES/LOTTERIES/CHARITY EVENTS: PROCESS FLOW CHART



## THINGS TO CONSIDER

- Fundraising Goal
- How is money being raised?
- What is the money being raised for?
- Reputation of Charitable Organization
- York University has a partnership with United Way
- Are tickets being advertised and/or sold on campus?
- All lottery and raffles are to be approved by York / Schulich
- Risk Management team and the OLCG

# 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?**

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## **MAIL ROOM – OFFICE SERVICES**

**Tammy Irwin**

Supervisor

Office Services

S030A

x33037

## **CLUB OFFICE KEYS**

**Sabine Friedrich**

Administrative Assistant

Office of the Executive Officer

W362S

x77891/55071



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# Important Dates

- **WEEK OF JUNE 1: Financial Responsibilities of the outgoing Executives**
- **WEEK OF JULY 6: Clubs shall provide a full list of all elected club officials**
- **WEEK OF JULY 6: the club's faculty/CDC advisor with contact coordinates**
- **WEEK OF JULY 6: Financial and Organizational Responsibilities of the incoming Executives**

### Office of the Dean

**Dezsö Horváth**  
Dean  
Office of the Dean  
N302

**Sean Siddik** Chief  
of Staff Office of  
the Dean  
N302G x55844

**Yvonne Massop**  
Administrative Assistant  
Office of the Dean  
N302 x55070

**Bela Husain**  
Administrative Secretary  
Office of the Dean  
N302 x55852

### External Relations/Event Planning

**Susan Kimberley**  
Senior Event Planner  
External Affairs  
W362K x33574

### Office of the Associate Dean

**Markus Biehl**  
Associate Dean, Academic  
Office of the Associate Dean  
N230A x77947

**Vasanthi Nallathamby**  
Secretary  
Office of the Associate Dean  
N230/N230B x44611

**Nikki Jagdeosingh**  
Secretary  
Office of the Associate Dean  
N230/N230B x40067

**Atipol Bhanich Supapol**  
Director  
IMBA Program  
N205K x77932

### Strategy Field Study (601) Office

**James MacKay**  
Director  
Strategy Field Study Office  
N203D x40885

**Tanya Duguid**  
Program Assistant  
Strategy Field Study Office  
N227 x55802

### MBA Program

**Ashwin Joshi**  
Director  
MBA/MPA Program

**Mel Poteck**  
Program Assistant  
MBA/MPA Program  
N228 x58089

### BBA/iBBA Program

**Detlev Zwick**  
Director  
BBA/iBBA Program  
N324 x77199

**Farrokh Zandi**  
Associate Director  
BBA/iBBA Program  
N205H x77959

### Centre for Teaching Excellence

**Ellen Auster**  
Director  
Schulich Centre for Teaching Excellence  
N307 x77898

**Teresa Back**  
Program Assistant  
Schulich Centre for Teaching Excellence  
N308 x55088

**Office of the Executive Officer**

**Magda Szaki**  
Executive Officer  
Office of the Executive Officer  
W362T            x77889

**Sabine Friedrich**  
Administrative Assistant  
Office of the Executive Officer  
W362S            x77891/55071

**Anwar Mustapha**  
Senior Financial Officer  
Office of the Executive Officer  
W362U            x77890

**Communications/Media & Public Relations**

**Paul Pivato**  
Communications/Media & Public Relations  
N302A            x55546

**Beth Marlin**  
Communications/Media & Public Relations  
N302A            x55546

**Elayne Shapiro**  
Communications/Media Assistant  
Communications/Media & Public Relations  
N302A            x55546

**Development & Alumni Relations**

**Mark Rittinger**  
Executive Director  
Development and Alumni Relations  
W362O            x58074

**Aloma Gravel**  
Associate Director  
Alumni Relations  
W362G            x33578

**Claire Simpson**  
Administrative Assistant  
Alumni Relations  
W362F            x33704

**David Bell**  
Associate Director  
Development  
W362M            x58131

**Naomi Ierullo**  
Administrative Assistant  
Development  
W362B            x58050

**Christina Niederwanger**  
Senior Development Officer  
Development  
W362C            x20658

**Career Development Centre**

**Rob Hines**  
Executive Director  
Career Development Centre  
N202D

**Minoo Bhuthani**  
Director  
Career Development Centre  
N202E            x22822

**Phanindra Deonandan**  
Associate Director, Career Education  
Career Development Centre  
N202K            x20331

**Lyla Korhani**  
Associate Director, Industry Advising  
Career Development Centre  
N202J            x22480

## Student Services/International Relations

### Dr. Marcia Annisette

Executive Director  
Student Services/International Relations

W263C

### Su-Lan Tenn

Assistant Dean, Students  
Student Services/International Relations

W262O x70228

## Student Services

### Sandra Osti

Records and Promotions Assistant  
Student Services

W262E x77971

### Carolyn Ward

Registration Manager, Enrolment Services  
Student Services

W262N x77007

## Office Services

### Tammy Irwin

Supervisor  
Office Services

S030A x33037

### Heidi Furcha

Financial Administrative Assistant  
Student Services/International Relations

W288 x22293

## International Relations

### Lindsay Hillcoat

Associate Director  
International Relations

W263L x77893

## Undergraduate Programs

### Keshia Gray

Associate Director, Undergraduate Programs

Student Services

W262L x70670

### Marianna Colalillo / Aran Tyre

Advisor/Coordinator

Student Services

W262M x20654

## Graduate Admissions

### Bailey Daniels

Director, Admissions & Recruitment

Graduate Admissions

W263A x44405

### Graham Sue

Assistant Director, Admissions (MBA)

Graduate Admissions W262D

x77970

### Carol Partland

Manager, Marketing & Recruitment

Graduate Admissions W263D

x77968

### Renice Jones

Assistant Director, Admissions (IMBA)

Graduate Admissions

W262H x20393

## Financial Aid

### Anne Caulfield

Financial Aid Officer

Financial Aid

W262K x30515

## 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

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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.

 Tweet  

 this ivey application makes me want to projectile vomit into the head of admission's mouth

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 **The Ivey HBA Program**  
 @IveyHBA

Duly noted.

1/15/2014, 10:04 AM

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**14** RETWEETS **38** FAVORITES

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 @IveyHBA I take it back omg (accept me pls)



**ANY QUESTIONS?**