HANDBOOK FOR STUDENT ORGANIZATIONS

UNIVERSITY OF TORONTO SCARBOROUGH

DEPARTMENT OF STUDENT LIFE

This publication is an informational resource produced by the Department of Student Life for student groups at the University of Toronto Scarborough. All information contained in this publication is either interpreted or summarized from official University policies, procedures, and guidelines or provided by student life and industry professionals.

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DEPARTMENTAL INFORMATION

The Department of Student Life provides you with diverse opportunities to obtain practical skills, knowledge and experiences that better prepares you to achieve personal, professional and academic success. Programs offered by the Department of Student Life include the Leadership Development Program, First-year Experience Program, International Student Adivising & Programs and Community Engagement Programs.

CONTRIBUTING DEPARTMENT

The Scarborough Campus Students' Union (SCSU) is the official representative of all undergraduate students at the University of Toronto Scarborough. SCSU is committed to providing effective advocacy, enriching the university experience, and addressing student needs and interests through the delivery of exemplary services. SCSU has successfully advocated for the creation of the Student Centre and is actively engaged in advocacy for its members.

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SECTION I

Student Organization Policies

WHAT CONSTITUTES A STUDENT ORGANIZATION?

A student organization is a group of students independently affiliated with and recognized by the University of Toronto Scarborough that share common values and goals, and who form an association in support of those values and goals.

Student Organizations at U of T Scarborough are classified in one of four ways:

1) Recognized Student Organization

A recognized student organization is any voluntary group that is "recognized" by the Department of Student Life under the University's Policy on the Recognition of Campus Groups.

2) Departmental Student Association (DSA)

Each academic department at U of T Scarborough has a Departmental Student Organization, which represents and advocates on academic issues for all of the students enrolled in that department. All students enrolled in a program specialist, major, or minor are automatically members of that department's DSA.

3) Student Society

A Student Society is a student organization that receives a certain amount of money (a "levy") from each student attending U of T Scarborough. The University of Toronto collects these fees on behalf of the Student Society. Student organizations must follow specific steps to become a student society, and adhere to a certain set of guidelines once they do so.

4) Student Society Affiliate

A Student Society Affiliate is an organization that has a formal relationship with a Student Society. Many Affiliates receive a levy via a Student Society (i.e. the parent organization's fee includes a designated amount which is passed on to the Affiliate).

POLICY ON THE RECOGNITION OF CAMPUS GROUPS

Voluntary organizations formed by members of the University community are a traditional part of campus life, and contribute in a significant way to its intellectual, political, social and cultural diversity and richness.

In its relations with these organizations, the University is committed to ensuring that all University members can communicate and explore all ideas freely, organize in groups for any lawful purpose, move about the University and use its facilities in any reasonable way, distribute on campus, in a responsible way, published material provided that it is not unlawful, hold meetings, debate and to engage in peaceful demonstrations, and be free from discrimination on the basis of sex, race or religion.

Recognition as a campus group is a privilege based upon observance of certain procedures and acceptance of certain responsibilities. It follows that this privilege can be withdrawn if these procedures are neglected or responsibilities abrogated by the organization or group.

Under the terms of this policy the University will not attempt to censor, control or interfere with any group on the basis of its philosophy, beliefs, interests or opinions expressed unless and until these lead to activities which are illegal or which infringe the rights and freedoms of others. By the same token, recognition as a campus group by the University implies neither endorsement of a particular group's beliefs or philosophy, nor the assumption of legal liability for the group's activities. It assumes only that the University has a responsibility to inform itself of organizations which use its facilities and name and to deny or withdraw recognition if the requirements of this policy are not observed.

FREEDOM OF SPEECH

In policies approved by the Governing Council, the University community has held that the essential purpose of the University is to engage in the pursuit of truth, the advancement of learning and the dissemination of knowledge. To achieve this purpose, all members of the University must have as a prerequisite freedom of speech and expression, which means the right to examine, question, investigate, speculate, and comment on any issue without reference to prescribed doctrine, as well as the right to criticize the University and society at large.

Of necessity, there are limits to the right of free speech. When members of the University use speech to deliberately prevent the lawful exercise of speech by others or interfere with the conduct of authorized University business, the University may intervene. Similarly, although no member of the University should use language or indulge in behaviour intended to demean others on the basis of their race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, sex, sexual orientation, handicap, age, marital status, family status, the receipt of public assistance or record of offence, the values of mutual respect and civility may, on occasion, be superseded by the need to protect lawful freedom of speech.

The right to free speech is complemented by the right of freedom of association, and extends to individuals participating in groups. All members have the freedom to communicate in any reasonable way, to hold and advertise meetings, to debate and to engage in peaceful assemblies and demonstrations, to organize groups for any lawful activities and to make reasonable use of University facilities, in accordance with its policies.

HOW DO NEW STUDENT ORGANIZATIONS BECOME RECOGNIZED?

The Department of Student Life is responsible for recognizing and training student organizations at U of T Scarborough.

To apply for recognition, new student organizations must complete the following process:

1) Draft a Constitution

Your constitution is the document that will set out how your group operates—how you elect your executive, how you make decisions, and more.

2) Submit the Recognition Form

Applying for official recognition involves filling out the online application form found at ***www.utsc-campusgroups.ca***. You will receive confirmation of this application, at which point you will be asked to submit your draft constitution for review.

3) Review Your Constitution with the Department of Student Life

Shortly after you submit your application and constitution you will be contacted to schedule a constitutional review meeting. At that meeting, feedback and suggestions will be provided on ways to strengthen your constitution. Once the final draft of your constitution, incorporating all necessary changes, is received, your application for recognition will be approved.

4) Sign a Recognition Agreement

When your organization is approved, you will be contacted to set up an approval meeting. At this meeting you will be asked to initial and sign a recognition agreement. At this point, your organization will be officially recognized. You will receive a copy of the approval form and a letter of status to assist you in opening a bank account for your organization.

HOW DO EXISTING STUDENT ORGANIZATIONS RENEW RECOGNITION?

Organizations should take note of the fact that recognition expires each September 30. Groups must renew their U of T Scarborough recognition in order to continue to use University facilities and the University's name. This includes maintaining U of T email accounts and web sites, continued use of other services and resources, and use of University space for activities.

Renewing group recognition commences at the beginning of April each year, but must be completed by the end of May. To re-apply for recognition, it's recommended that you follow these steps:

1) Consider potential changes to your constitution before your elections

Changes to your constitution should be voted on by the general membership, and the easiest way to do so is to have members vote on them when they elect your new executive. Discuss what changes (if any) you think should be made to your constitution with your executive and general membership at least two weeks prior to your elections to decide which ones (if any) you'd like voted on by your members prior to being re-recognized.

2) Provide incoming executives with access to the organization's email and web space accounts

Important information continues to be provided to student organizations throughout the summer, so make sure your new executives have access to your organization's email account, as well as have the ability to update your webpage.

3) Submit the Recognition Form and constitution

Reapplying for recognition involves filling out the online form found at ***www.utsc-campusgroups.ca***. You will subsequently receive a number of automated responses advising you to submit your up-to-date constitution, which must be reviewed as a condition of being renewed as a student organization.

4) Sign the Recognition Agreement

When your organization is approved, you will be contacted to set up an approval meeting. At this meeting you will be asked to initial and sign a recognition agreement. At this point, your organization will be officially recognized. You will receive a copy of the approval form and a letter of status to assist you in opening a bank account for your organization.

CONSTITUTIONAL REQUIREMENTS

Your constitution is the foundation upon which the organization is built. It provides the framework for the organizational structure, membership, procedures, rules of conduct, etc.

The University's interest in your organization's constitution is based around its desire that organizations and individuals using its name and its facilities engage in activities in accordance with the law. In addition, it is important that individuals who join an organization and take part in its activities do so with full knowledge of their rights and responsibilities with the group.

TIPS FOR CREATING AN EFFECTIVE CONSTITUTION

Your constitution is the framework through which your organization operates. It should state the purpose of your organization, the rights and responsibilities of members, the role of executives, and guidelines on how to administer finances, meetings, elections and succession planning. The guidelines laid out should allow for some flexibility on the part of those running the organization each year while ensuring that the organization stays true to the principals which it was founded upon.

For instance, a good constitution will not say, "Elections will be held each year on the 22nd of March", it will say, "Elections will be held each year by the end of March". This ensures that the fundamental idea—that elections are held each year by the end of the winter semester—is adhered to, but gives the executive some flexibility to take into account factors that the people who drafted the constitution might not have known about (e.g. the exam schedule that year).

It is also important to remember that your constitution must be clear. Nothing should be left to interpretation. For instance, saying, "a member can be removed for conduct detrimental to the organization" is quite vague unless you specify exactly what conduct detrimental to the organization means.

As you create your constitution, imagine yourself as someone running the organization five years from now. Ask yourself if what you are trying to say is clear to anyone who reads it. Never assume that someone will know what you mean or that you do not have to write something down because a process has always operated a particular way. Remember that you are creating a document that may exist long after you leave campus, and it needs to provide adequate guidance on how to run the organization in future years.

For further coaching on how to create an effective constitution, please visit the Department of Student Life website at *www.utsc-campusgroups.ca* to download the Constitutional Template.

SECTION II

Leading Your Organization

Leadership is less about holding a particular position and more about the skills and abilities you bring to your organization. It is about communication, influence and collaboration, and working with others to reach a common goal.

Before you embark on leading your student organization, take this opportunity to find out more information about how to develop as a leader and get buy-in on campus.

LEADERSHIP DEVELOPMENT PROGRAM

Your time at the University of Toronto Scarborough is about more than getting a degree; it is about your overall development as a person. It is about being exposed to new perspectives and re-examining your own. It is about learning how to build and maintain strong personal and professional relationships, and discovering new strengths and passions you never knew you had.

The Leadership Development Program can help you begin to develop skills and perspectives that will empower you to have a positive impact on your own life and on the lives of others.

The Department of Student Life offers leadership development workshops in the following areas:

Exploring Leadership

These workshops help you explore and understand your own perspectives and approaches to leadership, and how they impact the way you interact with others and society in general.

Personal Development

These workshops help you develop as an individual by providing skills and perspectives you can utilize every day. You can learn how to communicate more effectively, deal with conflict in a constructive way, manage your personal finances, deliver presentations , manage time and stress more effectively and many other skills.

Organizational Development

These workshops provide you with the skills necessary to contribute positively to the leadership of groups. From event planning to sponsorship, budgeting to volunteer management, you will learn how to better position your groups for success.

"Perspectives on Leadership" Speaker Series

Take the opportunity to hear a wide variety of guest speakers talk about their personal experiences and perspectives on leadership. From high-profile business and political leaders to fellow students who are making a difference in the world—this series gives you the chance to learn from and be inspired by some of Canada's most dynamic leaders.

To register for workshops, please visit ***www.utsc-leadership.ca*** or check the intranet daily.

STRATEGIC PLANNING

Strategic planning is a process often used by leaders to provide clear direction to organizations. A successful strategic planning process will examine and make informed assessments about your organization. This will help your organization anticipate and respond to change by ensuring its mission, values, goals, and objectives are clear to the primary stakeholders.

Strategic plans cover all aspects of an organization's work, including programs and services, management and operations, fundraising and finances, and decision-making. Depending on the organization's scope and emphasis, a strategic plan might also describe approaches to marketing, internal and external communications, and student recruitment.

Below are some guidelines for successful strategic planning:

1) Understand the environment in which you work.

No organization operates in a vacuum. Social, political and economic factors continually impact each student's willingness to participate in your group. It is thus essential that a strategic plan reflect the environment in which you operate. Programs, services and operations should be reexamined and reshaped in light of the current and future needs of students. Surveys and focus groups are helpful when trying to assess your environment.

2) Assess your organization's strengths and weaknesses.

The foundation of a successful strategic plan includes an assessment of the capabilities, strengths, weaknesses and limitations of your organization. Information, both objective and subjective, must be gathered from multiple sources, including executives, members, faculty, staff, donors and partner organizations. This process may include an assessment of staffing, programming, and communications of your organization.

3) Use a consultative approach.

All stakeholders in your group should have a voice in the planning effort. This may include current and incoming executives, staff, volunteers, members, donors and partner organizations. A strategic plan should not be the exclusive responsibility of a small group of stakeholders. If the planning process is to succeed, it must incorporate the views of all the constituencies that will be affected by the plan or have a role in its implementation.

4) Create a planning committee.

Strategic planning should be consultative—but not at the expense of being progressive. The core planning should be handled by a small planning committee with sufficient decision-making authority to analyze feedback provided by stakeholders and make recommendations for your organization. Committee members should not have the authority to arbitrarily adopt and implement key action steps. But neither should they be required to seek your organization's approval at every step. Your organization must have confidence in their skill and judgment.

5) Use case studies.

Each organization has its own customized strategies, values, goals and action steps. These attributes are often not transferable, no matter how similar the organizations. However, it is possible to learn from the successes, failures and mistakes of others. For example, every organization deals with challenges related to human resources, technology, finances, fundraising, succession planning and decision-making. When drafting a strategic plan, take into account how other student organizations have addressed the same challenges you face.

6) Prioritize and strategize.

Developing a workable strategic plan means analyzing your organization's objectives and strategies and determining which take precedence. Your planning committee should outline a full list of priorities and, if there are many, decide which to move ahead on and which to set aside. Once priorities are set, members of your planning committee need to identify strategies or sets of activities to achieve the goals and objectives. Next, key members should be assigned roles, timelines should be established and budgets created to reflect the new priorities.

7) Be open to change.

No matter how relevant its original mission was, no organization can afford to remain confined to the same goals, programs and processes year after year. As student needs change, strategies need to be revisited regularly. If your organization is to remain viable and effective, you must be prepared to change as extensively as conditions require. Failure to do so will result in your organization becoming unpopular or irrelevant.

THE COMPONENTS OF A STRATEGIC PLAN

Mission Statement: A mission statement is a brief expression of the organization's purpose. It should answer the questions "why do we exist?"and "what, at the most basic level, do we do?" (e.g. "The University of Toronto is committed to being an internationally significant research university with academic programs of the highest quality.")

A Vision Statement: A vision statement is a description of the organization's desired future state. It should answer the question "Where do we want to be?" (e.g. "Within the next five years, we will become the premier management consultant firm with revenues over $1 million.")

A Value Statement: A value statement is the principles on which an organization is built, and guides its planning, operations and programs. It answers the question "what do we believe in?" and "what's important to our organization?"

Goals and Objectives: The goals and objectives express desired outcomes for the organization's programming or internal operations. Progress toward achieving goals and objectives should be measurable objectives. Framed clearly, they answer the question "what do we want to accomplish?"

An Implementation Plan: An implementation plan identifies the cost, duration, priority order and accountability for each strategy and tactic in the strategic plan. The implementation plan answers the questions "what are our specific priorities?" and "how can we achieve our goals and objectives in a logical and feasible fashion?"

IDENTIFY THE ISSUES

U of T Scarborough is overflowing with legitimate student concerns. The amount of flat-programmable social activity space and study space available is amongst the lowest in the country. Rising tuition and incidental fees bite into students' pocket books. Various other problems—including ongoing struggles with student apathy and accessibility concerns—continue to hamper the student experience.

As student leaders you work to solve these issues, but deciding what issues to tackle can be difficult given the amount of time you have. The trick is to concentrate your energies on issues of student importance that have realistic outcomes.

GUIDELINES FOR IDENTIFYING WHAT'S IMPORTANT

Prioritize: Outline what issues are important and significant to your group at the beginning of the year and what you hope to accomplish in support of who you are and what you stand for as an organization.

Be realistic: You should be able to measure your success at the end of each year. Make realistic priorities. Often, the most successful student organizations focus on the small projects that can help students the most in the immediate future.

Be a problem solver: We all know what the problems are; it's the solutions to those problems that are elusive. Instead of exacerbating an issue by focusing on the problem, research an issue that you (or your members) are passionate about, become an expert, build alliances with important institutional stakeholders and offer viable solutions to fix the problems.

Be willing to compromise: Outlining your organization's priorities is important, but realizing that they are just goals gives your organization the flexibility to adapt to changing circumstances. When establishing your priorities, it is always beneficial to identify what you ideally want, what you are willing to accept and what you are not willing to accept. You are then able to negotiate a desired outcome without losing focus of who you are and what you stand for.

Has your organization identified an issue of student concern? The SCSU provides student representation for all undergraduate campus organizations in advocating for positive change at U of T Scarborough. Academic matters, equity and campus concerns, and space issues are areas in which the SCSU advocates to the University on behalf of student organizations. Please email studentsandequity@scsu.ca for more information.

FORGE MUTUALLY-BENEFICIAL PARTNERSHIPS

The University is a complex institution with many decision-makers, many decision-making bodies and many channels of influence. Figuring out who makes the decisions is difficult, but not impossible.

The Department of Student Life is your resource in bridging the gap with important decision-makers on campus. Each Student Life Professional at U of T Scarborough advises and consults students. Many also advocate to the Council on Student Services and Vice President & Principal on how to best enhance the student experience.

In many cases, Student Life Professionals are also past student leaders who may understand or feel a connection to causes like yours, and/or have an interest in their progress. The key is to reinvigorate that connection!

FORGING MUTUALLY-BENEFICIAL PARTNERSHIPS

Decide Your Stance: Deciding on a stance requires research. This may include a careful evaluation of the costs and benefits of a proposed solution, and a balanced approach to problem solving. Consult with administrators to get the historical perspective and stay on top of current events so that you can form a well-researched opinion. Lastly, separate the emotion from the issue—making an issue personal may alienate your potential partners and stonewall your cause.

Cultivate Interest: Creating partnerships is all about making a well-conceived and honest case for support by demonstrating how the values and goals of your cause complement the values and goals of the institution. To do this though, you need to communicate with decision-makers. Your best approach is maximizing your campus connections to get referrals to decision-makers and hopefully face-to-face meetings.

Make the Connection: Once you get access, take that extra step and secure support by developing a connection for them with the organization. A common way in which organizations secure support is to offer decision-makers an opportunity to participate in their social activities in order to provide first-hand perspective of who you are and what you stand for. Another way to get decision-makers connected is to offer them advisory roles in the organization to help shape how the organization functions.

DEVELOP AN INCLUSIVE FRAMEWORK

Some student organizations are stigmatized for their adherence to a particular identity or set of values. Prospective participants often believe they will not be given sufficient opportunity to express personal insight, experiences and values through participation in these groups. These individuals will then often either choose not participate in student life at all or will create their own groups to better address the issues and concerns which they feel are adversely affecting the campus.

The perception of there being limited opportunities for students to engage and collaborate in existing organizations contributes greatly to the overall sense of apathy that many students experience at U of T Scarborough—or, in other words, the belief that the campus operates in "silos."

To help overcome this belief, student organizations should create diverse opportunities for participants and prospective participants to freely share their personal experiences, insights and values with their peers. Through these opportunities, participants discern the value of engagement and collaboration as well as the benefits of working together to find mutually-beneficial solutions to the issues and concerns facing our campus, the local community and the world.

Developing an inclusive framework requires an organizational-wide commitment to enabling participants to engage in frequent dialogue in search of understanding and common ground. Organizations that have successfully developed an inclusive framework did so with the intention of facilitating ongoing opportunities for participants to better understand each other through discussion on topics of universal interest or concern. As a result, participants have been found to develop a stronger sense of community with their peers based on perspective and opinion rather than because of specific culture, ethnicity and faith.

Additional resources on this topic can be found at ***www.equity.utoronto.ca***.

WORKING WITH VOLUNTEERS

Leading an organization provides invaluable experience for students interested in advocating in support of a cause, forging meaningful partnerships, influencing important decision-makers, and contributing to positive change on campus. However, not everyone in your organization will experience the same realities as you. For example, the students who volunteer countless hours to support your team often are only exposed to the opportunities you provide to them. Indeed, sometimes volunteering can be a thankless task.

Check out the next page for strategies on how to effectively manage volunteers.

IMPROVING THE VOLUNTEER EXPERIENCE

Let Them Have Fun: It is important to allow volunteers the opportunity to fully engage in whatever activity it is that they enjoy. Be careful not to overburden volunteers with work that you could otherwise do yourself and spread the wealth around evenly to your entire team. Volunteers should be treated in the same way you would expect to be treated if roles were reversed.

Be Up-front and Honest: There is nothing more discouraging to a volunteer than not having a clearly-defined role and expectations associated with that role. Though volunteers should not be held to the same level of accountability as employees, it is still important to be clear in what is expected of them and to make sure their responsibilities are meaningful.

Share Ownership: Let volunteers share in the leadership of an activity or initiative. Yes; you will ultimately be responsible for what happens, but allowing your volunteers to take joint ownership of it will encourage them to share your passion and goals.

Provide Incentives: Reward or show your appreciation to volunteers for helping out. Host a reception, give them a hand-written thank you card, invite them to social outings or pay for their bus fare. These small tokens of appreciation add up and mean a lot in the long run.

Nominate Volunteers For Awards: U of T Scarborough has a various awards that celebrate the outstanding contributions that students make towards the community and campus. For more information on student life awards, please visit the awards sections at *www.utsc-studentlife.ca*.

Looking to connect your members to volunteer opportunities on campus and in the community? The SCSU Volunteer Network Program (VNP) provides students with the opportunity to engage in meaningful activities while developing the essential skills and experience that employers are looking for in today's workplace. For more information on how to volunteer, please complete a VNP sign-up form at the SCSU office or online at *www.utsc.utoronto.ca/vnp*.

SECTION III

Meetings

Meetings are a fact of our everyday lives, whether in your studies or extracurricular activities. How well an organization presents itself and its ideas and how well its members work with each other during meetings often determines its success.

A meeting should typically be held only when it is the best way to achieve an objective. Look for the goal, the purpose, and the basic reason for holding the meeting. Ask yourself and others involved: Why should we hold this meeting? What do we want to achieve at this meeting? and what do we want to achieve after the meeting is over? A meeting without a specific objective is almost certain to achieve nothing specific and may be a waste of everyone's time.

GUIDELINES WHEN HOLDING MEETINGS

Designate a facilitator: Choosing a person to facilitate the meeting keeps the meeting moving and develops leadership skills. Over time, rotate facilitators to give anyone interested a chance to learn this important skill. The facilitator's primary objective is to ensure that meetings function smoothly.

Some responsibilities belonging to the facilitator may include:

1. The facilitator may call the meeting to order only if a quorum of executives and non-executive general members is present in person. If a quorum does not exist, the meeting is invalid.

2. If applicable, the facilitator must ensure that the meeting is open to all applicable general members. General members must receive notice of the meeting in accordance with the constitution.

Establish an Agenda: An agenda is the official work plan for a meeting. Stick to the agenda as much as possible, but recognize that flexibility is a facilitation skill.

Some tips when using an agenda to help facilitate a meeting include:

1. The first draft of the agenda is prepared by the facilitator prior to the meeting.
2. The agenda may be modified only by a vote. This power should only be used when necessary as proper functioning of meetings and the organization requires advance planning.
3. General members may add or delete items from the agenda and may change the order of presentation.

Be transparent: One of the purposes of meetings is to provide a forum for the organization's leaders to review the activities of the organization and solicit feedback from members.

A full report should be presented by each executive at each meeting and then general members, in turn, may ask questions or comment. It is not appropriate to make motions or discuss items of business during this portion of the meeting. This time should also be used for any presentations to be made to the general membership.

Stick to it: It is the facilitator's responsibility to make sure that the meeting stays on track. Therefore, if someone begins to discuss something that isn't on the agenda, delay discussion of the issue until a later time. If the issue being discussed is important, write it down on a list of future broader issues to consider. If the issue is smaller and more detail-oriented in nature, write it on a post-it-note.

If discussion of an issue is delayed to later date, the following processes should be used to readdress that issue:

1. All old business must be revisited during the business portion of the agenda occurring after executive reports.
2. The general membership may vote to postpone consideration of any old business or it may remove any item from consideration.
3. Except in the case of emergency business, all new items of business are heard only after all of the old items have been addressed by the general membership.
4. All business must be conducted in the form of motions or resolutions adopted by a vote of the general membership.

Encourage participation: Seek balance between those who speak a lot and those who do not. Solicit ideas and suggestions from quieter and new members.

It is the custom and practice of most organizations to allow general members an open forum to ask questions and speak about their concerns to an executive after a report has been provided.

Strict time limitations should be imposed by the facilitator and these limitations must be enforced. Each general member should address the facilitator regarding an issue and must speak courteously and to the point.

Come prepared: By just answering other people's questions or keeping quiet, you will not be taking part in the opportunity afforded by attending a meeting. By having a concise message ready and finding a time to present it will give you a chance to command respect and understanding.

Avoid detailed decision-making: This should be reserved for other planning or committee meetings. Write decisions that need to be made on post-it notes and discuss them after the meeting.

When an item has been sufficiently reviewed and is ready to be deliberated, the following process is often used to ensure that decision-making is quick and efficient:

1. When an item of business is to be discussed, the facilitator announces the item to be discussed and opens the floor to discussion.
2. No general member may interrupt the speaker who has the floor.
3. The facilitator may impose reasonable time limitations. All time limitations must be uniformly imposed upon all of the general members. The speaker shall be given a one-minute warning before time runs out. By vote of a majority of the general membership, time limits may be extended.
4. The facilitator is to recognize each general member in turn. Discussion shall be limited to the item of business at hand, and the facilitator has the authority to take the floor from a speaker who does not limit discussion to the item of business at hand.
5. No general member may speak to an issue for a second time until all other general members have had the opportunity to speak to it for the first time. Likewise, no general member may speak to an issue for a third time until all other general members have had the opportunity to speak to it for a second time.

Reach a conclusion: When it appears to the facilitator that all general members have had the opportunity to fully discuss a matter at hand, he/she should announce that the item of business is ready for a vote.

There are three basic motions that can be used to trigger a vote:

1. A motion to adopt a specific action of the organization.
2. A motion to postpone the item to another meeting (including fact-finding assignments to a person or committee).
3. A motion to remove an item from consideration.

The general membership should be limited to discussing one item of business at a time, but there are no limits to the number of motions that may be considered as to how to dispose of that item of business.

After the general membership has had the opportunity to discuss each motion presented for consideration, the facilitator should call each motion presented to a vote.

The fact that a motion has been adopted or failed does not prevent the item of business from being added to the agenda in the future. All motions may be reconsidered at any time by the general membership.

Summarize the meeting results and follow up: Make sure that members leave the meeting knowing which decisions were made, which need further discussion and when they will be discussed, and which responsibilities were assigned. This helps create a vision of what's happening next and where the chapter is headed.

SECTION IV

Planning Events

The success of your organization's events depends on how prepared you are for the unexpected. Your organization should try to anticipate everything by systematically following a clear and agreed-upon process and remaining organized throughout the process. Obviously, smaller meetings are less complex than campus-wide events. You should recognize the scope of your event and plan accordingly. Avoid last minute stress, anxiety, or even the need to cancel your event by adhering to the necessary steps.

A typical process for planning events on campus involves the following steps:

1. Brainstorm ideas.

Create ideas for events with a group of people. If you're having trouble, keep in mind why are you having the event, the mission of the organization, what the event can provide to the University community, and how you can collaborate with other student organizations to plan an event.

2. Choose an idea.

Make sure that all members of the organization are committed to the idea. You will need the help of your membership to plan this event. If applicable, work with other student organizations to choose an idea.

3. Establish dates, theme, and location of the event.

When planning an event, be aware of other events happening during the same time such as exams, holidays, etc.

4. Create a budget.

Determine if your organization has enough money to cover the expenses of the event. If not, apply for grants or develop fundraising plans.

5. Develop goals.

Include timelines and a master task list. Communicate often with one another and ensure that everyone is aware of their particular responsibilities.

6. Have your event approved.

This should be done through the Department of Student Life's online event approval form at ***www.utsc-campusgroups.ca***.

7. Reserve a room location or site.

Make sure that the room or location is accessible for students with disabilities. You should not continue with planning the event if you have not received permission to hold this event or are unable to secure a venue.

8. Have your contracts reviewed and approved.

If you require a contract with a third-party service provider, such as a deejay, performer, or venue, be sure to follow the contract's terms and have the services approved by the Department of Student Life before finalizing any details.

9. Outline service requirements.

All services and equipment, including audio-visual, food, sound, light, staging, and maintenance, should be listed in the original event application submitted through the Department of Student Life website.

10. Market your event.

Develop a press kit, publicity materials, t-shirts or other promotional materials. Advertise on the intranet, bulletin boards, through email, Facebook, etc. For more information, see page 26.

11. Conduct a walk through.

Just prior to your event, divide your planning team into teams and ask them to write out first-person accounts of the event. Have your teams read their accounts to the group when finished. Team members should ask questions about potential problems they identify and formulate solutions to each.

12. Exercise due diligence.

If consideration must be given to the use of safe practices, waivers, or releases, ensure that you consult with the Department of Student Life prior to the event regarding proper guidelines.

APPLYING FOR APPROVAL OF ON-CAMPUS EVENTS

Student organizations must apply for approval of all on-campus events through the online booking form at ***www.utsc-campusgroups.ca***. On this form, you will be asked a series of questions about your event. Depending on its complexity, you may need the approval of various on-campus offices and administrators. You should leave plenty of time for your event to be considered. We strongly advise all groups to apply for their event a minimum of seven working days in advance except in the case of alcohol-related events, which require 10 working days notice.

The University of Toronto Scarborough is not responsible for assessment of student-sponsored off-campus events, however, the Department of Student Life does offer coaching to ensure that events are safe and well-planned.

RISK PROCEDURES AND GUIDELINES

To ensure that the University is acting responsibly in managing the affairs of the campus, it has enacted a series of procedures and guidelines to ensure that all events planned or sponsored by recognized student organizations on the premises are conducted in a manner that optimizes the experience of all organizers and participants, protects the community and minimizes liability.

The Department of Student Life has been charged with enforcing these guidelines on behalf of the University. These guidelines cover all venues and property of the University of Toronto Scarborough.

The Department of Student Life is specifically concerned with on campus events that meet one or more of the following criteria:

- Alcohol will be served and/or sold
- Food from off-campus suppliers will be served and/or sold
- Total participants exceed 150 persons
- Total non-U of T Scarborough participants exceed 20 persons
- Activities pose a physical, emotional, or financial risk to participants
- Activities are controversial and/or may be offensive to members of the campus community
- Media or external groups/ speakers will be present
- Third-party contractors or services will be present
- Copyrighted materials will be shown

If your event meets any one of these criteria (as determined by the Department of Student Life), please be prepared to meet with a representative of the Department of Student Life in person to conduct an assessment of your event.

FOOD SERVICE

The Department of Student Life requires that recognized student organizations conform to provincial, municipal, and University of Toronto health regulations when serving or selling food to others on campus.

You may be required to follow one or more of the following procedures when serving or selling food on campus:

- Food servers must wear gloves and some form of hair covering (a hat or hairnet).
- Sterilized utensils are required to handle and serve food at all times.
- Food must be brought directly from the vendor to prevent contamination.
- Food must be covered and kept warm or cool during transport to the site and during the time of service. Maintaining safe

temperatures by use of a chafing dish or cooling container is required at all times on campus.

All food service requests must include the proper business name of the supplier as well as their address, city, postal code and a complete list of menu items in order for processing to occur.

Recognized student organization cannot serve or sell homemade or home prepared foods at events on campus. Provincial regulations require that all food prepared for public consumption must be prepared in a suitable, approved facility by an individual with proper certifications as determined by the City of Toronto Public Health and University of Toronto Scarborough.

Does your event require the use of chafing dishes to keep food warm? The SCSU loans chafing dishes to recognized student organizations for on-campus events in order to ensure that all food service guidelines are being followed. For more information, please email campuslife@scsu.ca.

THIRD-PARTY SERVICE PROVIDERS

All contracts with third-party service providers, including but not limited to performers, sound and lighting providers, disc jockeys, and tent providers, must be reviewed and approved by the Department of Student Life prior to the service being permitted on campus.

Recognized student organizations are reminded to follow these processes when utilizing third-party services on campus:

- Third-party service providers must not be given exclusive control over the means, method, or details of an event without the Department of Student Life first reviewing all contracts and riders for services provided in University space.
- Third-party service providers may not promote the event to the general public without the approval of the Department of Student Life.
- Third-party service providers must possess their own comprehensive general liability insurance to cover participants in case of injury relative to the service provided at an event.
- Third-party service providers cannot store materials on University property for a period longer than is needed to provide a service for an event. The University of Toronto Scarborough will not store or accept responsibility for the personal property of third-party service providers.
- Third-party service providers cannot be substituted for University of Toronto employees providing a similar service without the written authorization of the Department of Student Life.

ALCOHOL SERVICE

In addition to the applicable provincial legislation, the University of Toronto has established rules and regulations to manage alcohol-related events organized by student organizations on campus. These rules and regulations cover alcohol service and advertising as well as provide guidelines on how to effectively manage the activity itself. The authority to enforce these rules and regulations is vested in the University's licence holders through provincial statutes and policies.

Provincial legislation and institutional policies provide licence holders with a range of powers to exercise their duties. These powers include, but are not limited to:

- The right to restrict access to licensed facilities and events to those who meet conditions of admission as defined by provincial laws or institutional policies.
- The right to limit and/or refuse alcohol service to guests at a facility or event if such service were to be in violation of provincial laws or institutional policies.
- The right to have a guest removed from a facility or event if the guest's continued presence would be in violation of provincial laws or institutional policies, or poses a risk to the safety of staff or other guests.

Student organizations are responsible for meeting with the license-holder delegate prior to their event prior to an event being approved. The Department of Student Life will facilitate this meeting on behalf of your group.

LIABILITY AND INSURANCE

Recognized student organizations assume legal liability for all events, activities and initiatives held on or off campus. It is your responsibility as the organization's leaders to exercise due diligence when planning events by carefully identifying risks associated with an event and employing safe practices to protect participants at all times.

For events outside of the Student Centre, the Department of Student Life will assist you with identifying risks and recommending safe practices to protect your event's participants. However, you should be aware that the University does not insure any recognized student organization for personal injury or loss of property at their events unless the University is responsible for the injury or loss.

Recognized student organizations should, whenever possible, obtain their own insurance for events; particularly if there is a moderate to high risk of injury or loss to organizers and participants.

STUDENT CENTRE

The U of T Scarborough Student Centre is operated by the SCSU and serves as a central hub of student life and social activities on campus. Recognized student organizations may book space, including meeting rooms and tables, directly through the SCSU office in the Student Centre, SL–108. Individuals who are booking rooms must provide valid university identification and a deposit before being allowed to take possession of a room key. Room bookings cannot be made more than 10 days in advance unless the student organization can demonstrate that special arrangements are required.

All meeting and social activity space in the Student Centre can be booked from Monday to Friday between the hours of 9:00 am and 7:00 pm and Friday 9:00 am to 5:00 pm. Additionally, you can make special arrangements to book the Student Centre Food Court & Student Centre Front Courtyard—please email campuslife@scsu.ca for more information.

Special arrangements for the reservation of the multi-faith prayer rooms located on the second floor of the Student Centre can be made through the Vice-President Students & Equity—studentsandequity@scsu.ca.

SHOWING COPYRIGHTED MATERIALS

Showing copyrighted materials, including a motion picture or television show, without the proper licenses or written authorization is illegal. The Department of Student Life will not approve special event requests that involve the broadcast/performance of a copyrighted work unless a copy of the performance license is provided.

The SCSU has obtained a license that allows copyrighted films from most major studios to be shown on campus. For a list of these film studios, please visit the SCSU office for more information.

If you wish to show a film not covered by the license, the following company handles the licensing for the majority of films released in Canada:

Audio Ciné Films Inc.
1955 Côte-de-Liesse Road,
Suite 210
Montréal (Quebec) H4N 3A8
1-800-289-8887
info@acf-film.com
www.acf-film.com

Costs for a one-time performance license range from $200–$400 per movie.

SECTION V

Marketing Your Organization

Marketing can be defined as the activity, set of institutions and processes for creating, communicating, delivering and exchanging offerings that have value for customers, clients, partners and society at large.

The overall process includes conducting market research (i.e. identifying who the overall audience is and what's important/significant to them) and market segmentation (i.e. identifying who the captive audience is and what's important/significant to them), business planning and execution (i.e. determining how to best raise awareness and profile with an audience and executing promotions to support a campaign) and managing partnerships (i.e. satisfying the needs and interests of your clientele).

Below is a basic outline for how to get started with promotion of your organization:

ORGANIZATIONAL PLANNING

Organizations that succeed do so by recruiting and keeping participants. They accomplish this by providing better value to participants than the competition. The marketing arm of an organization must constantly assess which participants they are trying to reach and how they can design programming that provides better value to those individuals.

To do so though, current and potential organizations must periodically undertake organizational planning to determine how to best operate in the midst of constantly changing circumstances and environments. Organizations must adapt to reflect the changes in the environment and make decisions about how to best manage the way they operate in order to succeed.

The first step of marketing your organization is thus concerned about the overall direction of the organization and involves decision-making about operations, finance, volunteer management and other organizational issues. The objective of an organization plan is to set the direction and structure for an organization so its programming meets the overall organizational objectives.

The following questions lie at

the heart of any organizational planning process:

- Where are we now?
- How did we get here?
- Where are we heading?
- Where would we like to be?
- How do we get there?
- Are we on course?

Once these answers are known, you can then begin to think about how they impact your organization's prospective audience.

MARKET RESEARCH

Marketing plays a key role in organizational planning because it is the job of marketers to understand and manage the links between the organization and the "environment."

After organizational planning, the next step in marketing your organization deals with how programming relates to a participant's or prospective participant's needs and wants. Part of determining your target audience's needs and wants is about making an attempt to involve everyone. Obviously not everyone in the campus community can participate in your organization, but would everyone be welcome? Is your programming gender neutral? Are your meetings accessible to people with physical disabilities? Would there be any type of racial, cultural, or sexual orientation prejudice?

When researching your prospective audience is, ask the following questions:

- Who is your core audience? Who is your disengaged audience?
- How can they find out more information about your organization?
- What might they like about your organization?
- What might they not like about your organization?

Use customer surveys, random interviews and feedback sheets to acquire this information. Once this information is known, a useful strategy is to classify your audience into groups or segments in order to tailor your programming to meet your audience's specific needs. In this regard, market segmentation can lead you to better marketing since it allows your organization to define and convey value in a way that is relevant to a particular audience.

Keep in mind that more is not necessarily better when it comes to audience data. If your organization plans three events a year, the crucial data will come from the participants of these events. For example, if your organization provides career training for students, your best target might be first- and second-year students since these segments are open-minded to shaping their University experience around whatever opportunities will ensure they get hired after graduating.

When examining audience data, be sure to pay particular attention to complaints and problems. Customer service studies show that between 2– 4% of unhappy customers complain, which leaves about 96–98% unaccounted for. Can you identify who the unhappy participants of your organization are? By assessing their experience, you may learn of a programming problem, discover a solution to a problem, and/or repair and save a relationship. Remember, if they are not talking to you, they may be complaining to your next potential member.

CONVEYING VALUE

Once your organization has determined how its purpose, vision and values correlate to the audience's needs and interests, the next step involves conveying value to an audience in a relevant manner. An easy way of conveying value is to identify where there is an overlap between your organization's purpose, vision and values and the audience's needs and interests. For example, if your audience is career-driven and tailors their participation on campus towards activities that will better assist them in achieving professional success, your organization should determine how your programming meets those needs and build promotional campaigns around a particular message purporting those claims.

There is no set process on what forms of media can be used to convey value to an audience. Typically though, organizations will convey value using a combination of the following forms of communications:

Branding: Branding can be defined as a name, term, sign, symbol or design, or any of combination thereof used to identify the programming and services of one organization or a group of organizations, and to differentiate them from those of other organizations.

Consistency in appearance, the level of professionalism and quality of performance are common characteristics that are often linked to a successful brand. Recognize that your brand resides within the hearts and minds of customers, clients, and prospects. It is the sum total of their experiences and perceptions of your organization – in many ways it is your source of promise to them. It can inspire, reinforce or detract interest.

Some questions to think about when thinking about what your brand is includes:

- Does your organization deliver its messaging clearly?
- Does your organization deliver credible and dependable services and programming?
- Does the services and programming offered connect with your audience emotionally?
- Does your organization create positive experiences for participants?

It is also important to understand that branding is not about getting your target market to choose you over the competition, but it is about getting your prospects to see you as the only one that provides a solution to their problem.

Publicity: Publicity is the deliberate attempt by an organization to manage the public's perception of its image. From a marketing perspective, publicity is one component of promotion. Unlike other forms of promotion though, publicity carries with it a certain level credibility by virtue of the fact it is often provided or generated by an external source (e.g. a news reporter, casual observer or participant). A high level of publicity is often generated through standard media outlets, particularly by the press. It is therefore advantageous to forge relationships with the media to give the appearance that you're providing news to them as opposed to them digging up news on you. This also ensures the press is always ready to report on happenings within your group.

Given, however, that organizations lack control over how the press uses the information provided to them and the frustration over the low percentage of releases that are taken up by the media, many organizations will choose create their own publicity. Examples of these methods include contests, event sponsorship, publishing polls or surveys, holding open houses, issuing reports, seeking endorsements and more. Suffice to say that with the economy struggling and organizations asking their staff to do more with less, publicity is a useful tool to simultaneously promote and lend credibility to initiatives.

Advertising: Advertising is the most conventional form of marketing used by organizations. It typically involves attempts by an organization to persuade consumers to make an investment of some sorts in the programming, products or services they offer. Many advertisements are designed to generate increased consumption of those products and services through the creation and reinvention of the "brand image." For these purposes, advertisements sometimes craft a persuasive message that is supplemented with factual information to reinforce for consumers why a particular investment may be justified.

Every major medium is used to deliver advertisements, including television, radio, cinema, magazines, newspapers, video games, the Internet, carrier bags and billboards. For your organization's purposes, it's important to understand that your target audience will be flooded with thousands of impressions delivered through advertisements on a daily basis. Therefore, using advertising as the sole method of raising awareness and profile may not generate the expected results you want.

However, if you recognize that advertising is a useful tool to reinforce existing conceptions that consumers already have of your organization's brand, you may find that the results to be rewarding. For this reason, try pairing advertising with other forms of promotion to maximize awareness of your organization's initiatives.

Relationship Marketing: In their haste to gain increase their exposure; campus organizations sometimes overlook the most important resource of all—their relationships with their members! This is ironic since the successes of many campus organizations are driven by the commitment of their volunteers, staff members and loyal participants. To survive in an increasingly competitive and changing social market, you must recognize that heightened public awareness of your organizations is only one part of the larger marketing process.

Building constructive relationships with selected target audiences is in many ways more important to your organization's long-term marketing success than acquiring widespread public awareness. This process is often referred to as relationship marketing. Relationship marketing – sometimes referred to as internal marketing – is the process of attracting, maintaining and enhancing relationships with key stakeholders.

Relationship marketing is often driven by "five I's"—Identification, Information, Interest, Involvement, and Investment. To fully appreciate the power of the "five I's," you need to think about individuals as operating within circles of influence. The closer to the center of the circle a person gets, the greater the influence that person may have on an organization and, conversely, the greater the influence the organization may wield over that person.

To illustrate, draw a small circle on a sheet of paper. Next, draw three concentric circles around that circle. Now imagine a core group of people within the smallest circle. Those are your stakeholders—so called because they have a personal stake in the success of your organization. The second circle is occupied by investors— people or institutions that have a connection to your organization and contribute regularly to its mission. The third circle is occupied by prospects—individuals or institutions that have shown interest in supporting your organization. The last circle is populated by possibilities—so called because you believe those individuals to be prospective participants.

To turn possibilities into prospects, you have to identify their connection to, interest in and ability to give to your organization and be honest about what you can provide in return. Prospects, in turn, need information about your organization as much as you need information about them. From information comes interest—that with which we become familiar. People tend to become involved in that which interests them assuming an organization has made a commitment to rewarding their participation. As individuals become more interested, they establish connections with an organization and are recognized for this connection. From recognition comes investment—which needs to be fostered over time through frequent assessment and reflection of each participant's experiences and insights.

Following the "five I's" remind us to focus our efforts on moving each occupant of a "circle" closer to the centre. In this way, possibilities become prospects who become investors. Once an investment has been made, relationship marketing is about constantly reinforcing value by offering competitive and innovative programming (developed through feedback provided by members) in order continuously pique their interest.

EMAIL AND WEB SPACE

Every recognized student group will be provided with a U of T Scarborough e-mail account and web server space free of charge.

When your group is recognized for the first time, your recognition package will contain a sheet identifying your organization's email account and website address. You will be provided with a generic password to begin with, which can be changed by visiting ***www.utsc.utoronto.ca/~accounts/chpasswds.cgi***.

To access your organization's web space, follow these steps:

1. Open Internet Explorer (NOTE: You MUST use internet explorer in order to upload new files, other web browsers will not work).
2. Type the following into the browser window:
   ftp://<CLUB EMAIL>@fissure.utsc.utoronto .ca/./public_html
   For example if your club email is generic@utsc.utoronto.ca, you would type:
   ftp://generic@fissure.utsc.utoronto .ca/./public_html
3. Enter your login and password when prompted (these are the same as your email login and password)

INTRANET

The Intranet can be an extremely powerful and effective communications tool for your organization. To access the intranet, visit ***www.utsc.utoronto.ca***, and click on the "intranet" link in the top right-hand corner.

The intranet provides a place for you to communicate with members and create an online home "channel" for your organization. Up to three executives from your organization will be given access to post information on the intranet.

To obtain guidelines on how to add members to your group account, create a group intranet channel, or post announcements to members, please email studentlife@utsc.utoronto.ca or visit ***www.scsu.ca/clubs*** for more information.

SECTION VI

Funding

One of the first questions that most new executives ask is, "Where can we apply for funding?" It is an important question, as funds are necessary to market and execute events, promote your organization and offer services to members.

Student organizations have six main potential sources of funds on campus:

1. Membership fees
2. Fundraising
3. Sponsorship
4. The CSS Student Enhancement Fund
5. SCSU Club Funding
6. Campus Life Fund

The University of Toronto Scarborough does not offer start-up fees for recognized student organizations.

MEMBERSHIP FEES

Membership fees are a key source of revenue for many student organizations. An annual membership fee is the sum of money that is required from each individual every year to be part of certain organizations. Collecting membership fees enables an organization to expand the offerings available to members without charging fees for each activity.

The organization's executive usually determines the exact amount of the fee, although it rarely exceeds $5.00. This fee is typically proposed as part of an operating budget presented to general members for approval at a valid general meeting each year.

Membership drives are most effective at the beginning of the year, so a strategy for recruiting new members should be a part of your strategic planning over the summer. Many organizations also attach an additional fee for certain events.

FUNDRAISING

It is quite common for student organizations to engage in fundraising activities to support their operations and events. Organizations often offer food and other materials (clothing, arts and crafts, etc.) for sale or hold events with an admission fee throughout the year. This is completely acceptable as long as the events are approved in accordance with the University's risk procedures and guidelines.

However, there are exceptions for lottery or gaming fundraisers taking place on campus since students, teachers and private corporations cannot apply for lottery (raffle) licenses. The definition of a lottery scheme is any event that contains the following three characteristics:

- there is a prize to be won
- there is a chance to win the prize
- there is a cost to purchase a ticket to be drawn for one to win the prize

If all of these components are in place at an event on campus, it would not be permitted by law. If one of the above-mentioned components were missing, then a license would not be needed.

Prizing can only be offered by a recognized student organization as door prizes, incentives to attract participants or as a non-conditional benefit for being part of the organization.

SPONSORSHIP

Some student organizations approach external organizations for monetary or product sponsorship. Almost all sponsors will expect some form of return on their investment from your organization. In return for their contribution, you may consider advertising some of their products/services, inviting them to attend a meeting as a guest speaker or some other form of exposure.

Remember that sponsorship is not always given in the form of money. In fact, most businesses are far more willing to offer sponsorship support in the form of goods and services. Examine your organization's needs, and think about approaching sponsors for:

- **Products:** clothing, books, equipment, software, etc.
- **Services:** Printing, website design and hosting, transportation, accounting, etc.
- **Discounts:** equipment rentals, group rates on transportation or events, room bookings, etc.

If you are interested in seeking sponsorship, contact the Department of Student Life for help in preparing a strategy for approaching potential sponsors for support.

THE COUNCIL ON STUDENT SERVICES' STUDENT ENHANCEMENT FUND

The Council on Student Services (CSS) allocates $30,000 annually to projects and initiatives that enhance the quality of student life at the

University of Toronto Scarborough.

Any recognized student organization is eligible to apply for funding. Initiatives that are deemed the exclusive responsibility of the University's operating budget will not be considered.

Projects that will receive priority consideration include:

- those promoted by students
- new projects that have not been previously funded
- campus-wide education or outreach programs
- accessibility or equity programs
- those that demonstrate a need for financial assistance

The deadlines for applications are as follows:

- third Monday of October
- third Monday of January
- third Monday of March

Please note that many groups request funding from CSS, but not all deserving proposals can be approved for funding. To increase your chances, make sure you spend the time to create a well thought out proposal, including what other funding sources your organization is attempting to acquire as well.

For more information, please visit ***www.utsc. utoronto.ca/stuaff/css***.

GUIDELINES TO WRITING A FUNDING PROPOSAL

A proposal for funding should include the following pieces of information:

Project Overview (200 words or less): This should summarize the "who, what, why, when, where, and how much" details of your proposal. Think of the project overview as an executive summary or abstract. Be specific and concise—only touch upon the key points. The best time to prepare the project overview is after you have completed the entire proposal (and you understand all aspects of your proposal very well).

Organizational Profile: This section defines who you are as an organization in a historical and present-day perspective, what you do and for whom, what's important and significant to your organization, how you conduct outreach on campus, who you work with, past successes, major challenges and number of staff and volunteers. Think of this section as the typical "about us" page on a website.

Statement of Need: This section is a statement of the problem at hand and why your project is important to overcoming the problem. You should focus on the needs of the target audience; not the organization. Cite previous projects and studies that are similar to what you are proposing. Position your project in relation to other efforts and show how your project will extend the work that has been previously done, will avoid the mistakes and/or errors that have been previously made, will serve to develop stronger collaboration between existing initiatives, or is unique since it does not follow the same path as previously followed.

Project Detail: This section defines your implementation plan for your project.

1. **Goals & Objectives:** Goals are the large statements of what your project aims to achieve. They form the basis for what you are proposing. Objectives are operational and outline the broad processes you will use to achieve your goals.
2. **Methods:** This portion of the proposal defines how you will achieve your objectives, and includes information pertaining to who will do what and when. Be explicit in your writing and state exactly how the methods you have chosen will fulfill your project's objectives and help deal with the needs/problems on which your proposal is focused.
3. **Budget:** Categorize your needs, how much it will cost, and specify exactly what you are asking to be funded. A good strategy to use is to ask for a small amount of funding for the first phase of the project, while indicating the totals needs of the project over the long-term. This provides assurances to the donor that it can terminate the relationship easily if your project is not successful, while also giving you the flexibility to return for future funding if the project has achieved its goals.

Evaluation: All proposals should describe how the success of the project will be measured at various stages to determine progress and demonstrate that the funding is working. This section does not need to be long, but it should describe how you will gain feedback on the project while it is being conducted (i.e. an assessment of the project's success in meeting it's objectives) and show that the project fulfilled that which was originally proposed (i.e. an assessment of the project's objectives). This can include any methods including surveys, focus groups, reports, journals, and interviews.

SCSU CLUBS' FUNDING

The SCSU supports the advancement of recognized student organizations on campus and sets aside approximately $50,000 annually to assist groups with costs arising from events and activities. To apply for funding, student organizations must complete a Funding Request Form available at the SCSU office (or through the SCSU website).

The SCSU Clubs' Funding Sub-Committee will review all submitted materials. An additional presentation may be required to supplement any and all requests for clubs' funding. The Clubs' Funding Sub-Committee meets approximately every two weeks to review proposals made throughout the year. Student organizations will be contacted directly by the SCSU about the status of their funding requests. Receipts must be submitted for all expenses related to an event. Funding will be issued by cheque to successful applicants, and will be available at the SCSU office.

For more information on application deadlines and administrative procedures, please visit ***www.scsu.ca***. You may also contact campuslife@scsu.ca for assistance in filling out clubs' funding forms, and ensuring your application is properly considered.

CAMPUS LIFE FUND

The purpose of the Campus Life Fund is to assist recognized student organizations with University-administered costs arising from venue rentals, maintenance, rental of audio-visual equipment, use of servers and security.

This Fund may, on occasion, also be used to sponsor recognized student organizations with special initiatives that serve a general student interest, are aimed at supporting the values of the University and/or enhance student life on campus.

All recognized student organizations are eligible to receive funding through the Campus Life Fund. Funding is applied automatically based on the stated needs of groups in each on-campus event application. The cumulative funding allocation for internal campus costs shall not exceed $300 per event. Costs in excess of $300 per event shall be paid for up-front by the Fund, but shall be immediately invoiced to recognized student organizations by the Department of Student Life.

Certain restrictions apply. For more information, please call the Department of Student Life at 416-208-4760 or email studentlife@utsc.utoronto.ca.

SECTION VII

Financial Management

Strong financial management, combined with adequate resources, can go a long way toward achieving success for your group. To emphasize the importance of strong financial controls, the Department of Student Life encourages student organizations to maintain proper and accurate financial records at all times. Each recognized student organization accepts full financial responsibility for all activities and initiatives it plans.

In the case of the student societies, the Department of Student Life may request your organization to submit audited financials by an independent accounting firm for review. An audit is a good way to re-educate your organization about proper financial management and can provide suggestions on improving your organization's financial management techniques. An audit also ensures that financial records are transparent to members.

LEGAL STANDING

Voluntary student organizations are not federally or provincially incorporated non-profit organizations. Indeed, they do not hold official legal standing in any context. Because of the annual income reporting requirements and the frequent turnover of student leadership (and the fact that student organizations are not handling excessive amounts of money), it is not customary for recognized student organizations to file for non-profit or charitable status.

Though recognized student organizations will, in most cases, not have legal standing, they may still be required to file taxes with the Canada Revenue Agency. This would be the case if:

- the total of all amounts received or receivable by the association in the fiscal period for taxable dividends, interest, rentals, or royalties is more than $10,000;
- the total assets of the association (determined in

accordance with generally accepted accounting principles) at the end of its immediately preceding fiscal period exceeded $200,000; or

- the association had to file an NPO information return for a preceding fiscal period.

In these cases, groups—though they do not have legal standing—must file a T4117 return. For more information, see the Income Tax Guide to the Non-Profit Organization (NPO) Information Return (T4117) at ***www.cra-arc.gc.ca/***.

FINANCIAL ACTIVITIES OF ORGANIZATION

Recognized student organizations at the University of Toronto Scarborough may not engage in activities, which are essentially commercial in nature. This is not intended to preclude the collection of membership fees to cover the expenses of the organization, or of charges for specific activities, programs or events, or to prohibit groups from engaging in legitimate fundraising. However, a recognized campus group cannot:

- have as a major activity a function that makes it an on-campus part of a commercial organization;
- provide services and goods at a profit when that profit is used for purposes other than those of the organization;
- pay salaries to some or all of its officers.

For certain organizations, however, the payment of staff or officers is acceptable (i.e. for recognized Student Societies only). In this case, if the worker of the student society is an employee, the payer is considered an employer. Student Societies are then responsible for deducting Canada Pension Plan (CPP) contributions, Employment Insurance premiums and income tax from remuneration or other amounts they pay to their employees. They must remit these deductions along with their share of CPP contributions and EI premiums.

If the worker is a self-employed individual (business relationship), he or she is considered to have a business and thus not entitled to employment insurance benefits. For more information, see ***www.cra-arc.gc.ca/business/index.html***.

SIGNING OFFICERS

Your organization is responsible for managing its own finances and financial records. The Department of Student Life will provide guidance, if needed, but the responsibility rests with the leadership of your organization. In order to maintain good financial control, it is necessary for more than one person to hold responsibility for financial transactions.

Recognized student organizations must designate a minimum of two signing officers in addition to the main organization contact to be responsible for the organization's finances. These individuals will coordinate all banking transactions and financial tracking and be responsible for creating an annual operating budget each year. Upon being recognized as a student organization, you will receive a letter from the Department of Student Life that confirms who you have designated to be a signing officer for your group. This letter may be required to set-up or change a bank account in the group's name.

When setting up a bank account, at least one current signer must be present in person at the financial institution where the actual account is held to add or remove additional signers to an organization's account. Additional new names can only be added when a current signer is present with that individual to authorize the change. In some cases, financial institutions may require that the former signing officers be present to authorize the change-over if the change is as part of an annual transition. Organizational leaders should consult with their respective financial institution to determine the specific processes concerning these types of changes.

OPERATING BUDGET

At the beginning of each fiscal year, the executives of the organization should plan the potential activities for the year and create a budget for each of these activities. This budget will provide a basis of how all funds of the organization will be used in the coming year. Be certain to document the key assumptions you have made in creating your budget, including ticket price, projected number of sales, etc.

The document may include:

- Last year's actual expenses and income.
- The present year's budget (projected expenses and expected income).
- The present year's actual year-to-date-total expenses and income.
- The variance between budgeted and actual expenses and income.

A typical student organization's operating budget will mirror a business' income statement in that it will usually only account for revenues, expenses and total profit/loss. An Income Statement is a summary of your organization's performance over a specified period of time, normally one year. It starts with your organization's revenues (also called sales) and subtracts the expenses incurred to generate those revenues. The result is your organization's net profit or loss.

Operating budgets should be prepared in advance of the final general meeting and should be presented for approval to the general membership at this meeting (assuming it's valid).

BANKING

The banking business of the organization must always be transacted with a recognized and reputable bank, trust company, or firm that is known and approved to handle financial tender and records by the Department of Finance Canada.

Recognized student organizations should designate one executive—preferably the President—to make all purchases and all purchases should be verified by the executive responsible for coordinating the organization's financial records. Organizations should not allow purchases to be made by the same person who reconciles the account.

Student organizations should limit the use of debit cards since they rarely provide the paper trail that is helpful in accounting. The use of an ATM to withdraw cash to purchase supplies should also be discouraged since mis-management of organization funds may occur more easily. Subsequent officers may also find it difficult to understand organization expenses without paid invoices and appropriate paperwork. Debit cards should be limited to making deposits. Daily limits for debit cards vary depending on the financial institution.

The University of Toronto Scarborough requires recognized student organizations to report to the Department of Student Life the name of the bank, trust company or credit union, the branch, account numbers and signing officers for all bank accounts opened in their name.

ACCOUNTS RECEIVABLE

When collecting income for your organization, it is important to follow clear guidelines to ensure all monies are accounted for. Whenever possible, it is important that actual cash not be accepted by your organization—using cash for transactions prevents accountability of officers and is difficult to track and document. Your organization should request that income to your organization be in the form of a cheque, made payable to your organization.

In the event that is cash is being accepted as a form of income, a Cash Receipts Log Sheet (see example on the following page) can help individuals track and maintain clear records of their total sales. The seller should reconcile the Cash Receipts Log Sheet with any unsold items (e.g. tickets) and return the log sheet, income and the remaining unsold items to the executive responsible for financial management. This individual should review any discrepancies.

CASH SALES LOG SHEET

Seller's name: ________________ Ticket numbers: ________________

Event name: ________________ Date of event: ________________

Ticket price: ________________ # of tickets sold: ________________

Total receipts (ticket price x tickets sold): ____________________________

DATE	NAME	DESCRIPTION	CASH/CHEQUE #	AMOUNT
11/17/08	Jimmy McNulty	2 tickets	cash	$20.00
11/21/08	Shakima Greggs	1 ticket	#301	$10.00

Individuals responsible for selling items should:

- immediately record all cash and cheques received on a log sheet. Cash and individual cheques must be entered separately. Cheques must be made out to the organization.
- endorse all cheques immediately in the name of the organization.
- secure all cash and cheques. All receipts should be kept in a locked box or drawer.

ACCOUNTS PAYABLE

Accounts payable—or paying bills—is the process of paying the expenses of your organization and entering those payments in your financial record. Payments or reimbursements should only be used for expenses that are for the purpose of the organization, as the organization has defined its mission in its constitution. In other words, student organizations must not be permitted to use the organization's bank accounts for individuals' expenses.

By following some simple guidelines, your organization will be well on the way to good financial management.

To pay an invoice (bill) directly to a vendor, the member requesting the payment should submit a completed Cheque Request Form to the executive responsible for financial management. The form must be submitted with the original invoice, which clearly documents the nature of the expense. In order to avoid duplicating payments to vendors, never pay from invoice copies or statements. This is a common error by student organizations. Always request new invoices from the vendor if necessary.

CHEQUE REQUEST FORM

Name of payee: ***University of Toronto***
Address: ***1265 Military Trail***
Telephone #: ***416-208-4760***

Amount requested: ***$70.00***
Reason for request: ***Event set-up/clean-up***
Requested by: ***VP, per invoice***

Please list expenses (in detail) below:
Facilities Maintenance: $35.00
Facilities Clean-up: $35.00

Please attach the original invoice or the original receipts and front and back copies of the canceled cheque (if applicable).

Treasurer Approval: ________________ Date: _____________

Presiedent Approval: _______________ Date: _____________

MONTHLY BANK ACCOUNT RECONCILIATION

In order to remain transparent to members and ensure that fraudulent activities are not taking place within the organization, your group should conduct monthly bank account reconciliations. There are a number of templates that you can use to conduct reconciliations. Once all receipts for expenses are processed, they should then be compared against respective line allocations in your operating budget to determine actual spending versus budgeted spending.

Balance Cheque per Register: This is the amount of funds in your account as documented in your cheque book.

Bank Fees: This is the cost of bank account. It represents an expense against your account.

Adjusted Cheque Register: This is total amount of funds in your account at the time in which the reconciliation occurs minus bank fees.

Balance per Bank Statement: This is the total amount of funds in your bank account as provided on your monthly bank statement. Outstanding payments should be detailed individually to account for the actual monies available.

MONTHLY ACCOUNT RECONCILIATION

Month end date:

Balance per cheque register[1]:		$ 4,510.00
Bank fees:		($10.00)
Adjusted cheque register:		4,500.00
Balance per bank statement		5,000.00
Less:		
	Outstanding cheques:	
	#224	$ 140.00
	#225	201.50
	#226	58.50
	#227	100.00
	Total outstanding[2]:	$ 500.00
Adjusted bank per balance		$4,500.00

Prepared by: (Treasurer's Signature)

Approved by: (President's Signature)

1. Amount should include amount of interest credited by the bank, if any.
2. These cheques should represent cheques written but not cashed during the month.

Adjusted Bank per Balance: This is the total amount of funds left in your account after all bank fees, deposits and expenditures have been processed.

YEAR-TO-DATE FINANCIAL REPORTS

The executive responsible for coordinating the organization's finances must prepare a financial report at least each semester and at the end of the term of office. The financial report provides information about that period's financial activity and a year-to-date summary.

The financial report should include the following:

- balance sheet as of the end of the previous month.
- statement of income and expenses for the entire fiscal year or fiscal year-to-date.
- comparison of budget and actual income and expenses.

SAMPLE FINANCIAL STATEMENTS AND BUDGET

Academic Year 2008–09

Income	Prior Year Actual	Current Budget	Year Actual	Variance
Ticket Sales	$2,650	3,000	2,400	–600
Lab Coat Sales	2,900	3,000	3,500	500
Membership Fees	250	300	280	–20
Fundraising	420	500	750	250
	$6,220	7,050	6,930	120
Expenses				
Food	$2,270	2,500	2,630	–130
Prizing	900	1,200	1,200	0
Swag	500	600	570	30
Marketing	700	750	723	27
Events	500	500	725	–225
	$4,870	5,500	5,848	–348
Net Income	$1,350	1,550	1082	–228

BUDGET ASSUMPTIONS

Ticket Sales: 500 tickets @$6/ticket

Lab Coat Sales: 100 lab coats @ $30/coat

Member Dues: 100 members @$3/member

Food: $100 per meeting for 25 meetings

Prizing: $8.00 per movie tickets for 150 movie tickets

Balance Sheet	**Date: Current Month End**
Assets:	
Cash	$1,500
	1,500
Liabilities:	
Event maintenance	$225
Bluff's Restaurant	$300

SECTION VIII

Succession Planning

Change is everywhere today and student organizations need to be able to carefully manage it to survive over time. Every organization needs to take into account the effects of frequent, annual turnover of its leadership and its leaders' inexperience when transitioning organizations from one year to the next.

To deal with these issues requires patience and an understanding of how a succession planning process works. It also requires a commitment from the entire organization to ensure that the long-term success of the organization is paramount at all times.

PLANS FOR CONTINUITY

Succession planning consists of the preparation of detailed plans and arrangements to ensure continuity for the organization. Continuity plans should be made for each critical activity that the organization undertakes.

One of the most important ways of ensuring effective continuity for an organization is through the maintenance of good financial records. Clear financial records and procedures help to ensure that the funds are used in accordance with the goals of the organization and ensure that executives of your organization prioritize activities for the year. The documents can also act as historical records, providing information on which past events were successful, which vendors had the best prices and when activities took place.

Some of the steps you will want to take when creating financial continuity plans are:

- file all financial records for the past year (receipts, monthly statements, etc.).
- complete the financial report.
- review the financial report with the new executive responsible for coordinating finances. Discrepancies and resulting actions should be documented in writing.
- change co-signers on the organization's bank accounts at your respective financial institution.

- deliver all bank statements, checkbooks and other financial information to the new executive responsible for coordinating finances for the organization.

CREATE A RECRUITMENT STRATEGY

One of the difficulties in running a student organization is finding committed and passionate individuals that are willing to dedicate their time (and occasionally their resources) to helping you manage it. Many of the individuals who want to get involved with your organization will also be enrolled in full-time studies, have a part-time job, possibly a girlfriend or boyfriend and a pretty active social life. Your difficulties are compounded by the fact that you cannot pay your executives a salary. It's thus important for you to start thinking about succession planning almost immediately after your leadership term begins. Most well-functioning organizations will begin thinking about recruiting next year's executives in September. In these cases, recruitment strategies are often coupled with membership drives. The intention of doing this is to empower new members to eventually be leaders of the organization in some capacity.

Recognize that when you obtain members, you have already piqued their interest to some degree. Your challenge going forward is to cultivate that interest by continuously making a case for how your organization benefits their personal, social and professional development. Start with an orientation or awareness event to attract students to your cause. Talk to participants about what your organization has planned for the year and ask them what you could do to make your events more fun and rewarding. Then ask for their email address so that you can invite them to future events. By doing so, you are saying that their opinion and participation matters and will make what you have planned better.

Follow-up your initial event with a smaller, more intimate reception. Invite individuals from the initial event that you feel fit the mold of a candidate who could lead the organization in the future. Coax their ego by reinforcing their value to your organization's success. Offer to pay for their meal, invite them to attend future events as your guest, or to become a student advisor to your organization. Perhaps an invitation to a social outing off campus would also work. Aim to create any opportunity you can to engage and get to know these individuals better. Through these opportunities, you are connecting future leaders to your organization and allowing them to take personal ownership of it.

CREATE A TRANSITIONAL MENTORING PROGRAM

After recruiting future leaders to your organization, you must provide ongoing mentorship to prepare them for the eventuality of managing the group. One way to do this is by pairing current leaders with less experienced leaders to provide training on what it takes to effectively manage the various components of the organization. Current leader-to-future leader mentorship improves productivity, expands problem-solving skills and allows prospective leaders to build better relationships with future colleagues and stakeholders by eliminating entirely the transitional period that often plagues the start of their terms.

Create learning outcomes: When designing a mentoring program, create goals, objectives and learning outcomes. This step is important because a haphazardly initiated mentoring program can waste time and frustrate participants. By indicating your desired outcome you can create clear goals for participants, which allows you to measure success and determine where additional training is required.

Play matchmaker: Pairing the right mentor to the mentee is critical to the success of your program. Both personality and tenure should be considered when determining mentor relationships. Positive interaction is crucial and diverse pairings typically create the most beneficial partnerships, as long as both participants are open to communication and an alternative points of view. People from different cultures, backgrounds and generations can learn more from each other than those with similar experiences.

Encourage mentoring up: The successful pairing of an experienced leader with a rookie allows both individuals to learn. Don't forget that younger or less experienced members also offer knowledge to their seasoned counterparts, especially concerning current trends. Younger members can also provide valuable, fresh insight on the values and goals of the organization. This knowledge can impact how your organization recruits new members and provide insight into the future direction of your organization.

CREATE DETAILED JOB DESCRIPTIONS

Recruitment and mentorship are critical in ensuring to a smooth transition for your organization. However, knowing how to be an effective leader and what the actual responsibilities are for holding a particular position are very different. Think of the time that a future leader spends learning a position prior to being elected or appointed as an opportunity to refine who they are. During this time, they will be given opportunities to acquire or hone their skills to better prepare them for the challenges ahead.

After being elected or appointed as a leader of the organization, new leaders are responsible for implementing what they have learned in a manner consistent with the goals and objectives of the organization. To assist with this process, it is important for you, as a current leader, to provide a clear blueprint of what their role will be. This is accomplished through the creation of detailed job descriptions. A well-thought-out job description is often used to explain what constitutes success in the job. You can measure how an executive is doing against expectations and help them get back on track, if necessary, simply by referring back to the job description.

Keeping the description up to date as the position changes will also help you coach your executives on expectations and give you standards by which to measure performance fairly and accurately. Most importantly, you can help new executives hit the ground running on their very first day of work by outlining exactly what they will be doing.

Detailed job descriptions should include terms of reference that outline the organization's responsibilities and commitments to each executive, a duties section that breaks down what each executive's responsibilities will be and a job posting that summarizes each executives' responsibilities as well as the minimum qualifications for holding a position.

TRANSITION BINDER

When undertaking succession planning, detailed job descriptions should be coupled with transition binders whenever possible. A transition binder includes important organizational information and insights from outgoing officers that will be passed on to future officers, including:

- Contact information for old and new officers, advisors, and, if possible, members.
- A copy of the organization's constitution, bylaws and/or charter.
- A brief history of the organization, its purpose and major past projects and events including timelines. This section should include news paper articles and press releases.
- A financial information section with a copy of the organization's current budget and samples of the most commonly used financial forms.
- Meeting agendas and minutes.
- A "marketing check list" with basic information on how to publicize organization events or services.
- A list of useful web sites and contacts.
- If your organization is a part of a national or statewide organization, include that organization's relevant information. This applies to some public service organizations and some religious groups, among others.

To further improve the succession process, consider:

- requiring new executives to meet with your organization's advisor (if you have one).
- timing elections to allow for adequate transition time (at least one month).
- holding a new executive training workshop for the old executives to train incoming leaders on duties and responsibilities of the position. There could also be a leadership component including time management, teambuilding, etc.

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