

# **P&S Club Leader Training 09-10**

Updated as of 08-09

### **What is the P&S Club?**

The P&S Club is the most active and comprehensive student activities organization in American medical education. Founded by Nobel Peace laureate John Mott in 1894, the Club currently sponsors over 50 clubs and organizations. These organizations represent P&S students' vast interests and talents, including athletics, performing arts, student advocacy, and community service. The Club's fluid nature allows new activities to arise as students' interests evolve. By providing P&S students with outlets for their various interests and talents, the P&S Club adds substantial depth to a program otherwise devoted to scientific and clinical disciplines. While all P&S students are members of the P&S Club, participation is open to all members of the Columbia University Medical Center community, including students, faculty, administrators, and personnel.

The P&S Club is intended to provide P&S students an opportunity to participate in extracurricular activities that complement formal education. The activities include athletic, social, political, cultural and community service.

We are committed to:

- Cultivating students' potential
- Excellence and Professionalism
- Establishing purposeful partnerships

### **Why join the P&S Club?**

The P&S Club allows students to engage with each other, the Columbia community, as well as the larger society.

- Assists in gaining connections outside of the classroom
- Creates lifelong friendships
- Allows for greater interaction with faculty and staff
- Plays an integral role in shaping both the academic and extracurricular aspects of student life
- Enhances personal leadership skills to better serve society in the future
- Helps clarify personal and career goals
- Creates a networking environment for current and future professional goals
- Increases time management skills
- Develops transitional work experience
- Creates connections to the campus and/or global community

### ***P&S Club Activities***

Many students become involved in clubs or organizations while at the College of Physicians and Surgeons. With over 60 clubs to choose from there is no shortage of ways to become involved or events in which to participate. The P&S Club provides support and advisement to these organizations and, in turn, assists students making them a success. In overseeing the clubs, we maintain all finances for the organizations including class funds, specialty interest groups, and other special programs.

The office also works with students to develop and carry-out a wide variety of all-campus activities throughout the year. The P&S Club is the student connection to activities at CUMC as well as the rest of the Columbia community. One method of communication is the Weekly Update Email sent to all of P&S as well as many members of the CUMC community regarding upcoming activities and events. The office can also assist students in planning and arranging many student functions on and off-campus.

### **Advocacy, Community Service, & Public Awareness**

- Columbia Science Mentoring Program
- Columbia Student Medical Outreach Program (CoSMO)
- Columbia University Harm Reduction Outreach Network (CUHRON)
- Ethics Club
- Integrative Medicine Club (IMC)
- International Health Organization (IHO)
- Lang Youth Medical Program
- Markets in Medicine
- Medical Students for Choice
- Physicians for Human Rights (PHR)
- REMEDY
- Smile Train, CUMC Chapter
- Students for a National Health Plan (SNHP)

### **Arts, Literature & Entertainment**

- Bard Hall Players
- Cinema Heights
- P&S Choir
- Coffeehouse
- Creative Rounds
- P&S Dance Club
- P&S Musicians' Guild

- Reflexions Art & Literary Magazine
- T.H.E. H.U.M.E.RUS
- The Ultrasounds
- Walker Percy Literary Society

### **Cultural & Spiritual**

- Asian Pacific American Medical Students Association (APAMSA)
- Black and Latino Student Organization (BALSO)
- Columbia Christian Fellowship (CCF)
- Medical Center Jewish Association (MCJA)
- South Asian Health Sciences Society (SAHSA)
- St. Luke's Society

### **Professional Organizations**

- American Medical Association – Medical Student Section (AMA)
- American Medical Students' Association (AMSA)
- American Medical Women's Association (AMWA)

### **Specialty Interest Groups**

- Allen O. Whipple Surgical Society
- Anesthesiology Interest Group
- Columbia Radiology Interest Group
- Dermatology Interest Group
- Emergency Medicine Interest Group
- Family Medicine Interest Group (FMIG)
- Internal Medicine Interest Group
- Obstetrics & Gynecology Interest Group
- Ophthalmology Interest Group
- Orthopaedic Surgery Interest Group
- Plastic Surgery Interest Group
- Psychiatry Student Interest Group (PsychSIG)
- Reemstma Society for Cardiovascular Medicine
- Steven Z. Miller Pediatric Society
- Student Interest Group in Neurology (SIGN)
- Urology Interest Group

### **Social & Recreational**

- Beerchus
- Chess Club
- Food Club

- Free Weight Club (FWC)
- Karate Club
- Lambda Health Alliance
- P&S Roadrunners
- Rugby Football Club
- Social Dance Club
- Society of Bacchus
- Squash Club
- Triathlon Club
- Water Polo Club
- Wilderness Medicine Club (WMC)

### **Special Programs**

- Columbia Harlem Homeless Medical Partnership (CHHMP)

### **Major P&S Club Activities/Responsibilities**

- New Student Orientation
- P&S Club Fair
- Leonides Winter Semi-Formal
- Super Night
- TeamWoRx (Part of Transition Week)
- Fall and Spring Fund Appeals
- Oversee all Class Elections

### **Policies and Procedures**

The P&S Club informs students about policies and procedures that impact their life as students at Columbia University Medical Center. The office also works closely with other administrative departments to facilitate the implementation of new initiatives or communicates changes to services that students need to be aware of.

### **Establishing a New Student Organization**

To make sure it consistently meets the needs of its members, the P&S Club encourages students to establish new and interesting activities that adhere to the mission of the P&S Club. All those wishing to establish a new P&S Club activity must comply by the following procedure:

1. Students interested in establishing a new club/activity must meet with the Director of Student Activities, to discuss their idea. This meeting will ensure that efforts are not being duplicated and will help the group define their goals for the new club/activity. The purpose of student organization must fall

within federal and state law, as well as University policy and Risk Management expectations.

2. After the initial meeting, a new club proposal must be submitted to the P&S Club Cabinet ([theplsclub@columbia.edu](mailto:theplsclub@columbia.edu)). This statement should include the following information:
  - a. A list of organizers, club chairs and interested participants from the CUMC campus – please include email contact information
  - b. Any interested faculty supporter or advisor if applicable
  - c. Any other forms of support for the proposed group, i.e. financial, moral, organizational. Note: Special Interest Groups should also include departmental support, including financial as needed.
  - d. Why you feel this organization should be part of the P&S Club: what would this group gain by being a P&S Club organization and conversely, what would the P&S Club gain from recognizing this organization
  - e. A detailed proposed budget and activities for the coming year
3. Proposals are evaluated by the P&S Club Cabinet (comprised of the representatives from each year). If the Cabinet votes yes to the proposed club, the group will be invited to present their proposal to the P&S Club Faculty Advisory Board (FAB) at its next meeting. The FAB has the final decision on the proposed club's status. If there are reservations about a proposed activity from the Cabinet or the FAB, recognition as a P&S Club activity will be withheld. This process only applies to clubs, not special interest groups. Special Interest Groups are determined solely by the P&S Club Cabinet. Merely creating a proposal does not guarantee the organization will be automatically recognized.

Notes:

- Proposals are evaluated 3 times each year (October, January & April). Please contact the P&S Club for specific deadlines.
- New clubs do not have set funding allotments and must request funds on an as-need basis, up to \$100, subject to the availability of funds.
- Special Interest Groups are allocated \$50/year. Any additional funding should come from the associated department or will be allocated on a case-by-case basis by the P&S Club.
- Any club/activity requesting funding outside of their current allotment should speak to the Director of Student Activities and are required to submit a proposal to be considered by the P&S Club.

## **Official Club Recognition/Registration**

In order to be recognized as an active student club, students are required to register their respected organization through the P&S Club. Student organizations registration is valid for one calendar year starting in the fall and ending in the summer. Student organizations are required to re-register by submitting their End of Year Report by the end of the spring semester as determined by the P&S Club Director. The new officers should work with the previous year's officers in order to complete these forms. If a student club does not submit an End of Year report or participate in activities during the year, they may be considered inactive and will have their P&S Club assigned budget withdrawn for the future.

## **Inactive Clubs**

If a club is inactive for 1-3 years and is without student leadership, it runs the risk of:

- P&S Club withdrawing club's budget allocation
- Being removed from the list of active clubs, but listed as temporarily inactive
- The final step is being removed completely from the P&S Club and reactivation will require a new proposal to be approved by the Cabinet and FAB

Before it gets to the point of complete removal, it can be reinstated if a student decides to take on the leadership role and submits an end of the year report with a plan for the following year. Please speak to the P&S Club Director if you have additional questions.

## **Event Planning**

In order to do any campus event planning, a student organization must be a recognized student organization through the P&S Club. The P&S Club assumes NO responsibility or liability for activities conducted by student organizations off-campus. Organizations are responsible and required to inform their advisor regarding meetings, programs and events. An updated list of recognized and active student clubs will be available on the P&S Club website <http://psclub.columbia.edu>

### *Event Planning Checklist*

The P&S Club has compiled the following guide to lead you through the process of planning an event at P&S. While this may seem to be a lot for some events, it provides a good framework for most events.

Remember that the P&S Club is here to help you. Feel free to drop by to discuss your ideas, concerns, and suggestions. It is important for your club status to keep the

P&S Club aware of what your club is doing throughout the year. For all large-scale events (greater than 50 people), it is best-practice to meet with the Director *at least* one month in advance to assist with strategizing and planning, to budget accurately, to ensure all the proper paperwork has been completed, and to think through the little details ahead of time. Think of this meeting as a way to help prevent (or at least reduce) stress and anxiety as the event approaches! For smaller events and meetings, the P&S Club should be aware of the event at least the week before. This allows the event to be properly advertised, food ordered, etc.

Don't forget: event planning is a lot of work, but it can be a lot of fun if you plan appropriately.

### **ASAP**

**Form a planning committee.** Recruit members from your organization to lead the effort (1 or 2 is usually fine) as well as a core committee to help plan and execute the event. Members of the core committee should each oversee a specific task (i.e. food & decorations, entertainment, advertising, etc.) and provide updates to the event leaders. If more than one organization is sponsoring an event, there should be equal representation from each group on the committee. Also set early deadlines. No matter how much you fight it, people miss deadlines and it's always helpful to plan around this inevitable fact of life.

**Pick a date.** The earlier you select a date, the least likely you are to run into conflicts and the better chance you'll attract a larger audience.

- Speak to the P&S Club and see the weekly update for upcoming events. You don't want to plan an event that conflicts with something major or over several other club events. You won't get a good turnout if there are too many other activities happening at the same time.
- Don't forget to check exam schedules for 1<sup>st</sup> & 2<sup>nd</sup> year exams as well as 3<sup>rd</sup> year rotation schedules (see attachment for Fall 2009 exams).
- Academic Calendar and other important P&S dates should be considered, including religious holidays:  
<http://juno.cumc.columbia.edu/ps/handbook/node/16>
- Events should not be scheduled during finals week unless the P&S Club previously approves it. The P&S Club Director will communicate the last day for events to take place as well as hand in receipts from the current semester.

**Reserve a room.** As everyone knows, space is VERY limited on campus and reserving high-demand rooms early is the key. You must be a current recognized student group by the P&S Club to reserve space on campus, and can only reserve rooms for official P&S Club events. If you are having trouble reserving a room, speak to the Director immediately.

- **Reserving Alumni Auditorium, Russ Berrie Conference Room, Hammer Health Science Center Classrooms:** Use Resource 25 Online Room Reservation System
  - Each club should designate 1 to 2 club leaders who are authorized to make room reservations on behalf of the organization.
  - After your training is complete, you can go online to request an account to begin making reservations for your club. These leaders can go online to create their own room reservation log-in (see handout) for Resource 25, the new online room reservation system.
  - Recognized student organizations are given the opportunity to reserve university facilities no cost (depending on facility, time of event, and AV requests). You must be a current recognized student group by the P&S Club.
  - Please make sure to use P&S Club as main designator for tracking purposes.
  
- **Reserving Bard Hall Basement, Recovery Room, Bard 1<sup>st</sup> floor lounge, Bard Roof, 100 Haven Courtyard:** Contact Housing Office.
  - In order to reserve certain spaces such as the Lounge or Recovery Room (not regularly used for events), speak to the P&S Club Director first before contacting Housing.
  
- **Psychiatric Institute Auditorium (1<sup>st</sup> Floor) and Conference Center (6<sup>th</sup> Floor):** Bret Cahn (212-543-5226). P&S Club should make initial contact.
  
- **Off-Campus Events:** Speak to the P&S Club Director to discuss your plan before committing to a vendor.
  - If planning an event at a bar/restaurant/lounge, the vendors must have their own liquor license.
  - Official P&S Club events with alcohol cannot take place in private residences. Private residence parties cannot use the Columbia University name, cannot use P&S money, and cannot be advertised through university means. Also no money can be collected at these events to support P&S clubs, otherwise it immediately becomes subject to P&S and Columbia University policies and procedures. If money is collected in support of an outside charity, it has nothing to do with the P&S Club and should be handled personally.

### **1-2 Months Before**

**Outline the event.** Read through the rest of this list so you have an understanding of what lies ahead. Be as specific as possible, but also be open to change. Things to think about in the planning stage:

- **Audience.** Who is your audience? How do you plan to reach your audience?

- **Budget.** What is the event's budget? You can never be too detailed when it comes to knowing your expenses and revenues! Will you be charging admission? Collecting donations?
  - Please see the Director if your event will involve collecting monies of any type. The P&S Club is the keeper of a cash box, but also ensures you are in compliance with the University's gift and donation policies.
  - If you are creating a new program or are co-sponsoring, speak to the Director regarding the availability of additional programming funds.
- **Outside resources.** If your event requires contracting outside vendors, reach out to them early. Many require payment upfront and the sooner you book them, the more likely we can get the University to directly pay instead you having to put out your own money!
  - The P&S Club is available to help you work with outside vendors. We have information regarding vendors, inside tips, and advice on handling payments.
  - Get all quotes in writing in advance. You don't want any surprise costs to come up later.
- **Staffing help.** By thinking of all the help you need ahead of time, you'll save yourself a lot of running around and stress at the end. Don't be afraid to delegate tasks to the committee.
- **Facilities Requirements.** A facilities request needs to be submitted as early as possible to make sure the appropriate equipment will be available.
  - **Classroom spaces:** You should add any facilities/AV needs upon requesting the room space through Resource 25 online. Otherwise email [hsclassrooms@columbia.edu](mailto:hsclassrooms@columbia.edu) to add facilities needs once the room reservation is confirmed.
  - **Bard Hall spaces:** Contact the Office of Housing Services to submit a room set-up sheet with your room reservation form. If provided enough notice, the staff will set up as you request.
  - **A/V Requirements:** This can be submitted upon making the online room reservation or through [hsclassrooms@columbia.edu](mailto:hsclassrooms@columbia.edu). There may also be charges for some services such as AV staff, so keep this in mind when planning your event.

## 2- 4 Weeks Before

**Recruit your audience.** Make sure to advertise in spots that will be noticed by your audience. Speak to the Director for suggestions if you aren't sure.

Advertising is one of the most critical points of event planning. The P&S Club is part of spreading that information, so be sure to let us know about events in advance, provide copy of your advertisements, and of course email the Director by the prior Friday of the event to include it on the Weekly Update Email, which goes out Monday mornings. Please include the following in your email:

- Name of Event

- Name of sponsoring groups
- Date
- Location
- Brief description
- Contact information

Other ways to advertise include:

- **Word of mouth:** Do this at related events, after lectures, through student/faculty/grad email lists, and other bulletins.
- **Black and white fliers:** You are welcome to use the P&S Club copier for small amounts of copying 8 ½ by 11” fliers.
- **Color Posters:** If your budget allows for it, try creating larger color posters. Speak to the P&S Club to find out what options there are and vendors to use.
- **Hammer Television:** Advertise to the entire CUMC student body by showing off your advertisements in the 24-hour area in Hammer. Contact P&S Club for details.
- **CUMC Calendar of Events and listserv:** If it’s appropriate to reach the entire CUMC community, then speak to the P&S Club about adding your event to the CUMC Calendar or Events or send out an announcement via the CUMC-events listserv.
- **CUArts and Ticket Information Center:** If you want to reach a larger audience of the Columbia community or want to sell tickets, another option is contacting the CUArts to publicize (<http://cuarts.com/>) or sell tickets through the TIC (<http://cuarts.com/calendar/tickets>).
- **Office of Government and Community Affairs:** If the community is involved in your project, reach out to the Office of Government and Community Affairs (<http://www.cumc.columbia.edu/dept/gc/index.html>).

#### *Flyers/Posting*

- There shall be no promotion of the consumption of alcohol in fliers, web-based announcements or other materials.
- All promotional materials must include the name of the student sponsors of the event and the school in which they are registered.
- No posting of flyers on department bulletin boards without approval.
- The name(s) of the sponsoring student organization(s), event title, date, time, location, and brief description of event is/are required on all postings/flyers.
- All advertisement must state all parties hosting event i.e. co-sponsorships.

**Confirm reservations for rooms, equipment and services.** Please take the time to do this; because this is when the details come up- do you need programs, tickets, decorations, tablecloths, centerpieces? Have you submitted a room layout? Has the food order been placed?

## Days before

**Dry run.** Meet with your committee and talk through what each person will do the day before and the day of the event. Include any participants or performers. Practice transitions between sections of the event (e.g. will people be too busy eating to pay attention to the performance? Will the music stands be on or off the stage throughout the event?)

**Print schedule or program.**

**Pick up food, decorations, and equipment.** Assign point people for all tasks. Don't forget about getting and setting up food, getting the power point presentation ready to go, collecting tickets, cleaning up, etc. Remember to use your tax exempt forms!

## Day of

**Set up early.** It always takes longer than you thought it would.

**Have a backup plan.** Save power point files on a back-up device. Bring a selection of CDs in case the band is stuck on the subway. Be ready to have people run to the deli for more soda or ice.

**Relax.** Enjoy your event! You worked hard and deserve to have fun.

**Leave only footsteps.** Take down and recycle as many posters as possible. For large events, basic clean up is included. Pick up as much trash as possible before you leave the event. Go back the next day to make sure that you didn't forget anything. Return equipment and rentals promptly.

## Day after

**Don't forget to say "thank you".** Everyone loves to feel appreciated and making a simple note, call, or email to those involved will make their day. Maintaining good relations with those that help you is essential if you want to plan an event in the future.

**Reconcile your finances.** Make sure all receipts that need to be reimbursed are turned into the P&S Club in a timely fashion and we can deposit any money collected from the event. See the methods of payment section for more information on paying for your activities.

**Review the event.** Make a folder of important information for your successors. Take note of what went well and what you might have done differently. Collect verbal and

written reviews from your audience. Share your information with other club leaders and the P&S Club.

*P&S Club Tips/ Things to know:*

- Speak to the Director regarding policies for Barbeque Events and Sterno Use Guidelines
- No candles can be used during events
- Assign people in advance to clean up
- Use plastic tablecloths for easier clean up
- If you have an event in Bard with outside guests invited, additional security is required at a cost to your club/organization. Security also requires the names of any vendors that will be attending your event (this includes DJs, band, etc.)
- Bard security should be aware of the number of people attending, who is the responsible party at the event, if cash is being collected, who collects it, and where it is stored.
- If alcohol is being served, who is checking ID? Who is serving the alcohol? An alcohol permit is required if selling tickets
- P&S Club has a storage closet that can be used for keeping supplies for future use of your organization. Speak to the Director about the space.

## Club Leader Responsibilities

The role of being a P&S Club Leader entails more than leading an organization. By accepting the leadership role of a P&S Club organization, the officer agrees to participate in and abide by the following commitments:

- Attend any mandatory training or meetings
- Respond in a timely manner to any emails or requests from the P&S Club
- Participate in the annual Fall Fund Appeal (*November*)
- Participate in the P&S Club Fair and Revisit Fair
- Submit the following material on a timely basis:
  - Club participation list (*September*)
  - P&S Handbook publication material
  - End of the Year Reports and updated Club Constitution (*May*)
  - Any updates of documents or waivers as needed by your organization
- Inform the P&S Club of all events hosted by and expenses incurred by the organization in a timely manner
- Inform the P&S Club of any changes in club's officers
- Maintaining all club spending information, make sure all reimbursements, receipts, and paperwork are turned in a timely manner. These should be handed in within a week of the event.
- Always using tax-exempt forms. You will not be reimbursed tax on any purchases made.
- Follow all legal and safety guidelines as determined by Columbia University and P&S.

Your activities and behavior as a club leader not only are viewed by other students, but also by the Columbia and general community. Your actions reflect back on the P&S Club when you associate yourself with the university. As a club leader, you are held to a higher standard and are expected to behave as such.

If policies and procedures are not followed, the Director has the authority to freeze your budget and club activity for a period of time to be determined by the P&S Club.

### *Constitution Guide*

The following is a guide for prospective and current student organizations. All recognized student organizations must submit an updated constitution when submitting their End of Year reports to the P&S Club. It doesn't need to be very formal, but this will provide you with a document to work from in the future. Feel free to ask the Director for assistance in working on this document as well as your club members.

- Preamble: Main purpose of your organization

- Name: Name should reflect the purpose of the organization
- Purpose: Why does your organization exist? What does your organization wish to accomplish? Examples: Promote harmony among students, staff, and faculty...Advocate on behalf of...Provide an environment that supports...
- Membership: Who is considered a member and what are their rights? Please note that only Columbia University students, faculty and staff can be members.
  - Ex: The following will be members of this organization, given voting privileges, etc.: Only members who are in good standing with the University, Only members who have attended three consecutive meetings, Only members who have attended at least half of organizational sponsored functions.
- Governing Structure/Officers: The University requires each organization to have at least a president/point person. It is up to you how you are going to structure your organization and how you title them. Other positions may include: Vice President, Secretary, Events Coordinator
- Appointments/Election and Removal of Officers: How are Officers appointed/elected (majority vote, 2/3votes, consensus, etc). If questions regarding an officer were to arise, how would an officer be removed from office (2/3 vote, consensus, etc).
- Length of Term: Officer Positions will normally be held for a one-year term. Be specific about when a position begins and ends.
- Officer Duties: Define the duties of each office to assist with officer transition from year to year.
  - Ex: President/Chair/Head Coordinator: Attend meetings or arrange for an alternate to attend, Convey all information from meetings to membership, Represent and advocate concern of members in public and private; Financial Officer: Maintain records of financial transactions of the group, Regularly advise the membership of its financial status.
- Amendment of the Constitution: How is the student organization constitution amended (additions and deletions to the original document submitted to P&S Club must be given to P&S Club for final approval to ensure that the amendments made do not alter the mission of the student organization).
  - Ex: The constitution may be amended at any meeting subject to the following: Two-thirds of the voting membership in attendance must vote to accept the amendment.

## **Club Budget and Finances**

All recognized student organizations in good standing are eligible for student organization funding. The amount of funds that will be allocated to each organization on an annual basis will depend on:

- Budget proposal (through the end of year report)
- Previous year's expenses & revenue
- Projected expenses & revenue for the upcoming year
- Group participation in P&S Club events and overall presence (fund appeal, communication with the P&S Club)
- Amount of funding the club receives from outside sources
- Status of the P&S Club overall budget

The P&S Club Director will oversee the allocation of budgets to student clubs and will inform student leaders over the summer.

If no proposal is submitted but the group has been active, the budget will be the same; for groups that have been inactive and have not submitted a budget proposal, no budget will be allocated. See information above about club inactivity.

It is the responsibility of each organization to communicate with the P&S Club throughout the year regarding its financial status.

- All financial activity that is not recorded by the P&S Club will not be considered in the following year's budgeting process. (I.e. if your group collects dues to pay for certain expenses but does not record this with the P&S Club, the Club will not recognize that the expenses occurred.)

Special requests for additional funding during the year will be reviewed once the P&S Club Director receives a proposal. There should be a discussion between students interested in extra funding and the Director at least a month prior to the event/activity.

## **Specialty Interest Groups**

- Each group will be given a minimal budget from the P&S Club of \$50/year for basic supplies.
- Each group is responsible for maintaining the relationship with its corresponding department for professional and financial support.
- Additional funds are available for large-scale events. The sponsoring groups need to submit an event proposal with budget proposal to the P&S Club AT LEAST one month prior to the event.

## **Non-Profit Status/Tax Identification**

All Student clubs MUST use tax-exempt forms for any purchases made on behalf of the P&S Club or any approved student clubs. Tax-exempt forms are available at the P&S Club office. Please be aware that the university cannot reimburse tax on any purchases made for programs and events.

## **Allocation vs. Revenue**

The P&S Club gives most clubs an allocation to support their activities, but several clubs sustain their activities through other sources. Many clubs do receive funding from outside sources such as hospital departments, grants, membership dues, and professional organizations. If you would like to pursue those options, please speak to the Director.

As the university and P&S Club budgets are not guaranteed every year, it's important to keep in mind that your budget allocation is not guaranteed every year. You must consider that that you might not receive the same or any money at all the following year, as the budget is subject to change year to year. Some clubs are self-sustaining and more may be required to so in the future

- For any contributions or membership dues, we can only accept cash and checks. All checks should be made out to Columbia University. All funds collected should be given to the director for deposit, which includes membership dues, advertising, contributions, donations, etc. Everything should be submitted to the P&S Club for deposit into university accounts.
- For departments wanting to give contributions, an interdepartmental invoice (IDI) form can be completed. Please speak to the Director to process this.
- Fundraising may be an option, but please speak to the Director to make sure you are following proper university development procedures.
- Unused P&S Club funds allotted for one year will NOT carry over to the next fiscal year. Only revenue will carry over.

You should keep track of your budget in two ways:

- Itemized budget 1: by event organized by date
- Itemized budget 2: by category- food, supplies, travel, entertainment, etc. This is how the university divides it up, so this will help me to plan the P&S Club budget for the future.

Another option to stretch your budget is co-sponsorship. Speak to other clubs that might have similar interests in planning events. Speak to the Director in regards to contributing money or splitting up costs.

### *Co-sponsorship*

Co-sponsorship is always a good idea to recruit more people to the event and to gain additional funding. This can be with other P&S student organizations, CUMC departments/offices, or other student organizations within Columbia University.

Mailman: <http://sklad.cumc.columbia.edu/sph/studentlife/index.php>

Columbia College: <http://www.studentaffairs.columbia.edu/sda/groups/>

Teachers College: <http://www.tc.columbia.edu/studentactivities/>

The P&S Club has a special fund for innovative projects that foster collaboration among organizations. If you believe your event qualifies as one of these, contact the Director about submitting a proposal. To use the fund, the following steps must be taken:

- Students interested must discuss idea with the Director
- Detailed project proposal must be submitted to the P&S Club
- After decision is made, students will be given feedback and any award allocated

While some potential donors frown upon giving money to student groups, they may be willing to provide more tangible resources. Printing and food donations are a couple great examples of donations that will save both money and time!

## **Methods of Payment**

No club leader or club member should be expected to make large purchases and put out significant amounts of their own money. To avoid this scenario, PLAN AHEAD and follow the steps below. Whenever possible it is best for the university to cut a check directly to the vendor.

Please make sure your organization has enough funds to cover your spending, otherwise invoices and reimbursements will be denied. Please speak to the Director regarding your plans, so the P&S Club can help you plan.

### *Invoices*

- Determine the exact items needed and the vendor that supplies the goods.
- Contact the vendor and ask for an invoice for Columbia University. Please see attached sample invoice to ensure it includes all the proper information. Remind them we are tax exempt! You can fax them a tax-exempt form from the P&S Club.
- Submit the invoice to the P&S Club along with your contact information in case questions arise.
- A check will be cut and mailed directly to the vendor.

For pre-payment on payment day of event, please begin the process at least 4 to 6 weeks in advance to ensure timely payment. Otherwise invoices should be submitted within 24-48 hours after the event takes place.

Vendors are now required to fill out additional paperwork in order to be put into the system as a vendor, so speak to the Director in advance to see if they are already an approved vendor.

Often invoices come with contracts. Please do not sign any contracts on behalf of your club. The P&S Club Director is the only person authorized to do so.

### *Purchasing Card*

- For pre-payment/payment upon service without an invoice, speak to the Director to use the P&S Club purchasing card. This card cannot be removed from the Director, but orders can be placed over the phone or online to pay. This is often used for food orders for events on campus and supplies.
- Fill out pcard purchase form with P&S Club
- Place the order with the Director and give pcard payment information to vendor. Make sure to tell them we are tax exempt.
- As a club leader, you are authorized to sign for the order and include an appropriate tip upon delivery. Ask the Director for suggestions upon ordering.

- Return the itemized receipt within 24-48 hours after the event and confirm the number of people in attendance.

Please note the pcard cannot be used to purchase alcohol, pay for rentals, and can only be used for events on campus.

The P&S Club has a Fresh Direct account that is already set up as tax exempt, so if you would like to use that please speak to the Director.

### *Individual Reimbursements*

If you do have to put out some of your own money, there is a process to get you reimbursed. Whether you use petty cash or the travel & business expense form, it is important for you to turn all receipts in within 24-48 hours after the event.

#### *\*Petty Cash*

- You must submit an itemized receipt, which cannot exceed \$80 and must be paid in cash (not debit or credit cards).
- Fill out petty cash paperwork with the Director.
- Petty cash is to be used for “necessary and reasonable small business transactions”. This can include food, beverages, ice, and other supplies needed for events, but not to purchase gifts, alcohol, or electronic equipment.
- Petty cash can be used to pay for services such as lighting design or referee, only if the proper receipt is submitted. Speak to the Director for more information.
- Make sure you used a tax-exempt form; otherwise you should contact the vendor to get tax reimbursed. You will not be reimbursed the tax if you do pay tax on a purchase.
- *For items that do not meet the above criteria, a Travel & Business Expense (TBE) must be completed. A check will be sent to the individual who made the purchase in 3-4 weeks.*

#### *\*Travel & Business Reimbursement*

- TBE forms can be downloaded at <http://psclub.columbia.edu/clubs/leaders/TBA.pdf> or picked up from the P&S Club office. See the P&S Club Reimbursement Process Handout for more information on the reimbursement process.
- Complete the Travel & Business Expense Form within 24-48 hours after the event/program takes place. Use the sample from this packet to fill the form out properly. You must submit requests for reimbursement **within 120 days** from the date of the expense. Receipts submitted after 120 days may become a taxable expense to the payee.

- Always include the following:
  - Small receipts must be taped onto 8 ½ x 11” paper. Taped receipts should be in chronological order. Receipts should not be stapled
  - All original receipt must be itemized (even for meals)
  - Tape down receipts in date order onto a separate blank white sheet of paper
  - Include supporting documentation: fliers, posters, conference itineraries, etc.
  - Please do not staple the paperwork, just paperclip
  - If food is purchased, indicate the number of people if more than 10. If less than 10, please list the names
  - Make sure you used a tax-exempt form; otherwise you should contact the vendor to get tax reimbursed. You will not be reimbursed the tax if you do pay tax on a purchase
  - Complete a description for each receipt, not just the name of the vendor
  - Provide evidence of the payment method (if it is not listed on the original receipt with the last four digits of the credit card) by submitting a copy of your credit card statement, which shows the funds have been withdrawn
  
- Once paperwork has been submitted, approved, and processed, a check for the reimbursement amount will be sent directly to the address listed on the form. The timeline can take up to 4 to 6 weeks for the entire process to occur. Please contact the Director if you have not received your payment after a month.
  
- You cannot be reimbursed for payment for services rendered or honoraria made with personal funds. Please refrain from writing personal checks or payment by cash to public speakers or any other individuals that have provided a service to your organization. The P&S Club will not reimburse you.

## Vendors

All new vendors must complete a vendor validation questionnaire in order to be put into the Columbia University system. If you are not sure whether or not the vendor has been used before, please speak to the Director. This process will add some time to the invoice process, so please make sure to plan in advance. Also some vendors require payment upfront, so speak to the P&S Club about beginning the process.

### *Audio Visual*

Contact 5-help or [hsclassrooms@columbia.edu](mailto:hsclassrooms@columbia.edu)

### *Campus Advertising*

CUMC Events: <http://sklad.cumc.columbia.edu/calendar>

Hammer Television: Contact P&S Club

### *Flowers*

Anthony Florist, 4034 Broadway (btw 169 and 170 St) 212-923-3469

### *Catering*

Carrot Top, 212-927-4800, Desserts and coffee, pay by credit card

Gristede's, speak to P&S Club, full catering, direct billing (invoice)

El Malecon Restaurant, 212-927-3812, Caribbean Food, cash only for delivery (credit accepted on site)

Faculty Club, 212-305-5652, on-campus banquets, direct billing (invoice)

Famous Famiglia Pizzeria, 212-927-333, pizza, credit card or cash

Fresh Direct, speak to the P&S Club to use account

Mike's Bagels, 212-928-2300, breakfast, direct billing (invoice)

Nam Thai, 718-432-2570, large quality buffet (thai food), credit card

X Caffe, 212-543-1999, [xcaffe@gmail.com](mailto:xcaffe@gmail.com), on-campus catering (delivery & set-up included), direct billing (invoice)

### *Party Supplies*

Oriental Trading, <http://www.orientaltrading.com/>

### *Printing*

Columbia University Printing Services: 212-854-3233, [printing@columbia.edu](mailto:printing@columbia.edu)

Kinko's, 221 W. 72 St at Broadway: 212-362-5288, [usa0812@fedexkinkos.com](mailto:usa0812@fedexkinkos.com)

### *Room Reservations & Set-up*

Call 5-Help or email [hsclassrooms@columbia.edu](mailto:hsclassrooms@columbia.edu)

Bard Hall: Office of Housing Services, Bard Hall 100, 212-304-7000

### *Security*

Emergency: 212-305-7979

Office of Public Safety (non-emergency): 212-305-8181

Bard Hall Security: 212-304-7200

### *T-shirts*

Ultimate Impressions (contact: Jeff): 212-239-3360, [www.ultimateimpressions.com](http://www.ultimateimpressions.com)

Ask the P&S Club about new vendors or for products/services not listed, or to add vendors you've worked with to this list.

## **Official Policies**

As a P&S student at Columbia University, you are responsible for being aware of all policies that affect both your individual behavior as well as your club/organization.

*University Policies:* <http://juno.cumc.columbia.edu/ps/handbook/node/7>

*P&S Policies:* <http://juno.cumc.columbia.edu/ps/handbook/node/8>

If your organization or individual behavior in relation to the P&S Club violates any of the above policies, you may be subject to discipline from the P&S Club and/or P&S Student Affairs. Violations may result in student organization privileges being revoked, including recognition. Any alleged violation will be reviewed and based on initial investigation, forwarded to the Dean of Student Affairs for review and possible sanctioning. The University assumes no responsibility or liability for activities conducted off campus.

## **Alcohol & Drug Policy**

All student organizations will adhere to Columbia University Alcohol and Drug policy located in the current university publication FACETS:  
<http://facets.columbia.edu/policies-alcohol-and-drugs>

Students are also subject to CUMC Supplemental Guidelines:  
<http://juno.cumc.columbia.edu/ps/handbook/node/233>

For any events with alcohol at the CUMC campus, student leaders must participate in Alcohol Event training as determined by the Center for Student Wellness and AI:MS.

## **Overview of Advisor Roles & Responsibilities**

The Director of Student Activities and P&S Club will act as the advisor to all recognized P&S Club student organizations. Student organizations should keep their advisor updated on the activities of the organization throughout the year. Their role is to help facilitate the process of academic, philanthropic, and social activities while

respecting the diverse interests of the campus community. The P&S Club oversees and approves all events planned by student organizations on campus. While providing advising/professional services to student/ student organizations, the P&S Club encourages all students to participate in campus life activities.

The advisor will have no legal responsibility for student organization debts, although debts incurred by organizations should always be a matter of concern to the advisor. The role of advisor shall be purely advisory, except in the case where assistance is requested or a specific situation has developed that requires the advisor's attention. If necessary, the advisor can bring such situations to the attention of the Dean of Student Affairs.

### **Campus Resources**

P&S Club  
50 Haven Avenue, Bard Hall 106  
New York, NY 10032  
212-304-7025  
[theclub@columbia.edu](mailto:theclub@columbia.edu)

P&S Student Affairs  
630 West 168th Street, P&S 3-401  
New York, New York 10032  
212-305-3806

Center for Student Wellness  
107 Bard Hall  
New York, NY 10032  
212.304.5564  
[studentwellness@columbia.edu](mailto:studentwellness@columbia.edu)

Student Health Service/ Mental Health at CUMC  
60 Haven Avenue - Lobby Level (location) [map](#)  
630 W. 168th Street, Mailbox 77 (mailing address)  
New York, NY 10032  
212.305.3400

Office of Housing Services  
50 Haven Ave  
New York, NY 10032  
(212) 304-7000 Phone  
(212) 544-1900 Fax  
Email: [housing@cumc.columbia.edu](mailto:housing@cumc.columbia.edu)