

# Welcome!

- Please grab some food and then go to this link:  
<http://psclub.columbia.edu/clubleader>
- Open the Club Leader Training Manual in a separate tab for reference
- Thanks!

# P&S Club Leader Training Spring 2017



Rosemarie Scilipoti, P&S Club Director  
Rochel Bushman, P&S Club Program Coordinator  
Ryan Blake, P&S Club Rep  
Jon Xu, P&S Club Rep

# I Have A Question...

- **P&S Club Website + Club Leader Training Manual**
  - We'll review this more in detail later, but many things you need are posted on the site.
- **P&S Club Reps - Jon (jtx2000) and Ryan (rmb2218)**

Start with them for questions, they can help you find the answers.
- **Program Coordinator - Rochel Bushman ([ag3084@columbia.edu](mailto:ag3084@columbia.edu))**

For questions on event planning, ordering food/supplies, events ideas, and budgeting.  
Processes reimbursements and deposits so drop off paperwork and money to her.
- **Director – Rosemarie ([rs2914@columbia.edu](mailto:rs2914@columbia.edu))**
  - For major events, grants, fundraising, and working with other areas of the university, speaking with her is going to be the best option.
  - **\*\*Spring 2017 Office Hours: <http://psclub.columbia.edu/contact>**
  - **\*\*Are You Coming In With Multiple Questions? It is helpful to set up an appointment, so there is more time to discuss and ask questions. Let us know in advance what you're looking for so we can be prepared with helpful information.**

# P&S Club Policies & Procedures

## **Club Leader Responsibilities = Requirements for Active Club Status (pgs. 3-4)**

- Mandatory attendance and participation in:
  - Club Leader Trainings, Events & Meetings
  - Fundraising Activities
  - Club Fair and Revisit Fair
  - At least one event per semester with at least half your membership
- Prompt submission/adherence to all paperwork:
  - Finance/Budget (Reimbursements, Invoices, etc.)
  - End of Semester Reports & Post Event Evaluations
  - Submission of Required Waivers
  - Club Constitution
- Prompt response to all emails/requests by the P&S Club Office

***Deactivation can result from not adhering to the above: Communication is key in prevention!***

# College and University Policies

- **Alcohol Policy:**
  - Except Coffeehouse, no club is allowed to serve alcohol at an event without the **written approval** of the P&S Club.
  - You must hire a **bartender** through Faculty Club to serve alcohol at your event - **\$200/bartender**
  - Guests with proper 21+ ID must be **stamped** by club leaders (stamps can be found in P&S club office)
  - There must be an appropriate\* amount of **food** served at any events with alcohol. *\*appropriate as determined by the P&S Club Director*
  - You must complete **social host training** provided through AIMS office
- **Waivers:**
  - (ex: Free Weight Club, Rugby)

# Budget & Finance

**Budget:** How does my club receive P&S Club money and where does it come from? (pg. 6)

**Outside Revenue/Fundraising:** How can I get more funding for my club? (pg. 6-7)  
\*\*If you are looking to apply for grants and/or want to have a fundraiser speak to Rosemarie asap.

**Spending Policies:** How much can I spend on my club's activities and events? (pg. 8)

**Methods of Payment:** How can I pay for/get reimbursed for club events? (pgs. 9)

\*\*Submit **reimbursements** to Rochel

\*\*Submit **contracts** to Rosemarie - never sign it yourself as you are not authorized.

**Conference and Travel Guidelines:** Can my club pay for conference travel? (pg. 8)

# How can I get more funding for my club?

- **Apply for funds and/or grants** – The P&S Club Director must be aware of and approve all grants submitted – **meet with Rosemarie**
  - President and Provost's Event Fund (P&P Fund)
  - CU Arts: Gatsby Student Arts Support Fund
  - Kraft Family Fund Intercultural & Interfaith Awareness Fund
  - Arnold P. Gold Foundation Grant for Student Initiated Projects
  - The Steve Miller Fellowship in Medical Education
  - AIMS gives grants for events without alcohol; speak to the P&S Club Director for more information
  - For non-university grants you must speak to the P&S Club Director
- **Membership dues, advertising, contributions, etc.** – **Submit to Rochel**
  - **\*\*Money collected is NEVER to be spent directly on supplies, gifts, speaker fees, etc... It must be submitted to the P&S Club office and deposited into your University account. To not do so is ILLEGAL. We will discuss in a few minutes**
- **Fundraising** – **Meet with Rosemarie**
- **Donations** – If you have someone who wants to give to your club, they can go to:  
<https://giving.columbia.edu/giveonline/>
- **Co-sponsorship with departments and/or other clubs** – submit an [IDI form](#)

# How to spend my money:

- **Prior to any purchase check with the P&S Club office to verify your current available budget**  
**\*\*if you do not verify, your club may not have the funds to cover your reimbursement**
- Budget for Events:
  - Meetings & Socials (snacks/appetizers & non-alcoholic drinks) - \$3/person
  - Regular Events (lunch or dinner, inc. non-alcoholic drinks) - \$7-\$10/person
  - Special Events – meet with Rochel or Rosemarie to discuss budget.

**\*\*For expenses totaling over \$1,000 the vendor MUST be paid directly by the University.**

- Alcohol Policy (pg 12)  
**Should you serve, advertise, provide, and/or encourage alcohol at a P&S Club event without the written authorization of the P&S Club Director then the club leader(s) must meet with Dr. Mellman and/or the P&S Club Director. Additionally, event expenses will not be reimbursed.**
- Gift Cards and Certificates are not allowed to be purchased per CUMC & P&S policies.
- Any club that does not adhere to the above will run the risk of not being reimbursed, paid for expenses incurred and/or freezing of club budget.



# Methods of Payment

1. All purchases must be made with a tax exempt form! If you forget the tax exempt form & are charged tax, you will **not** be reimbursed for tax.
2. Payment Options:
  - P&S Credit Card (P-Card)
  - Invoice/Purchase Order
  - Personal Funds and then Reimbursement  
(Travel & Business Expense Report/Reimbursement Form)

\*regardless of form of payment all receipts must be submitted to the P&S Club office.
3. [Transferring Departmental Funds \(IDI Form\)](#)
4. Conference and Travel Guidelines - speak with Rochel or Rosemarie
  - Conference fees - can be paid directly with the P-Card.
  - Travel expenses - can be reimbursed before the conference takes place.
  - Lodgings and local travel - can only be reimbursed post conference.

# Methods of Payment: P-Card

- Place orders in the P&S Club office and pay with the credit card
  - **Food** – on campus only – ie Tung Thong Thai, Famous Famiglia, Kismat, El Malecon, fresh direct, etc...
    - Speak to the director about Key Foods, Gristedes, Haven on Haven
  - **Conference fees** – registration only
  - **Online purchases** – amazon, staples, target, walmart, home depot, etc...
  - **Gifts** – Columbia bookstore, online retailers
  - **Promotional Swag** – t-shirts, bags, etc... sold by Columbia University approved vendors only
  - **Electronics & Media** – ie B&H, best buy, etc...
- As a club leader, you are authorized to sign for the order & include 10% tip for delivery.
- Return the **itemized receipt** within **24-48** hours after the event to the P&S Club Director and confirm the number of people in attendance. Please also bring or e-mail the **flyer** from your event.
- The P-card cannot be used to purchase alcohol, rentals, or food for off- campus events.
- Check out this guideline on the website [“How to order food, supplies.....”](#)

# Methods of Payment: INVOICES & PURCHASE ORDERS

- Please check the [P&S Club vendor list](#) for our most commonly used vendors.
  - **Food** – on or off campus – ie Faculty Club, Famous Famiglia, Dinosaur Bar-B-Que
  - **Rentals and Contracted Services** – ie speaker/panelist, DJ, equipment maintenance, photography, transportation, rentals, etc...
  - If there is a vendor you would like to use that is not on [this](#) list, **DO NOT** start to do business with this vendor **UNTIL** you speak to the P&S Club Director. Failure to follow this procedure will lead to failure of payment and reimbursement.
- Request an invoice from the vendor made out to Columbia University with a unique invoice number, invoice date, and total amount due (**quote number will not suffice**). Must include an email and/or phone number so Columbia can contact them with any questions. **Payment takes 4-6 weeks.**
  - Plan in advance accordingly as your vendor may require payment upon delivery.
  - Need proof of liability insurance & signed performance agreement/contract to P&S Club
  - **DO NOT sign any contracts on behalf of your club as you are not authorized to sign contracts. Submit the contract to the P&S Club Director, so it can be reviewed by purchasing in advance.**

# Individual Reimbursement Process

- You must submit all receipts for reimbursement **within 7 days** of the event.
  - Failure to do so will hold up the process and delay reimbursement.
- The **reimbursement & W-9 forms** are located on the P&S Club website:
  - If you used a **credit card** you must include
    1. Itemized receipt showing a credit card transaction (last 4 digits of CC listed) *or*
    2. Credit card statement w/ your name listed on top
  - If you paid with **cash**:
    1. Attach an itemized receipt with proof of payment.
- If you were charged tax- please remember you will only be reimbursed for the total **minus** tax.
- Always include a copy of your event flier or an email advertising your event.
- Please update your address online!

# Event Planning

1. **Check the calendar-** P&S Club Calendar, Class Website Calendar, SSN, academics/exams on OASIS, meal plan, holidays, etc.
2. **Meet with the P&S Club Director &/or Program Coordinator-** *the larger the event, the earlier you should meet about your event!*
3. **Reserve a Room-** (pg. 11 & link under Club Leader Resources on website)
4. Review our **Event Planning Tips** (pg. 10)- Have you remembered everything? AV? Security? Supplies? Facilities? Food? Drinks?
5. **Advertising-** Digital Signage, Weekly Update, and Other Resources
6. **Payments, Reimbursements, and Finance-** *the larger the purchases, the earlier you should hand in paperwork to start getting the payment processed!*

# Reserve a Room

- All reservations can be made through the P&S Club by emailing [psclub\\_rooms@cumc.columbia.edu](mailto:psclub_rooms@cumc.columbia.edu) except for spaces in Bard Hall, at least a week in advance of your event.
- Events in Bard Hall Lounge or Ballroom – be in contact with the P&S Club office
  - Book with Housing Office
  - If providing food you are required to use Faculty Club with the exception of pizza.
  - Be aware you are charged for set-up & clean-up. Weekends are more expensive.
  - Depending on your event, additional security may be needed at your club's cost.
- Events in Alumni
  - For lighting, AV, sound, you *must* set up a meeting with Jonathan Kornberg ([jk3220@columbia.edu](mailto:jk3220@columbia.edu)) to discuss and get instruction on the proper usage of the AV equipment and moving the podium.

# P&S Club Website

- The website is maintained and updated for your convenience, so please use it for all forms, surveys, and quick links (Calendar, Club Leader Resources, Approved Vendor List)
- Unsure about a policy? Check the manual!
- Print & fill out forms before coming in—they're all available on the website!
- Mailing Lists and Listservs

# Final Remarks

- Always use your Columbia e- mail addresses for club/organization related business.
- Keep us updated with any changes to your leadership.
- When In Doubt, Check The Web Out.
  - Forms, Surveys, and Quick Links... It's All There!
- Questions?
  - Just Ask! We're here to help.