

OUSA AFFILIATED CLUBS AND SOCIETIES HANDBOOK

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Key Support People

Clubs Development Officer / Sarah Taylor

Sarah is your go to person for anything club related!

From Affiliation to general enquiries and advice to Clubs day, Grants and the University of Otago Blues and Golds Awards – Sarah has the answers for you

If you have any questions, you can flick her an email sarahtaylor@ousa.org.nz

Recreation Officer / Josh Smith

The Recreation Officer is a part of the OUSA executive. The Recreation Officer is newly elected each year and works to foster recreation within the University Environment. They do this by:

- Representing recreation on appropriate university committees
- Representing recreation in appropriate OUSA panels, committees and councils e.g. the grants committee, blues and golds panel and affiliated club's council
- Building and maintaining good working relationships with OUSA Recreation staff, University Recreation Services staff and other key stakeholders

In addition to the above responsibilities the Recreation Officer also performs general duties required of all executive. The Recreation Officer is allocated ten hours per week to perform these questions.

What are the main differences between the Recreation Officer and Clubs Development Officer?

- The Recreation Officer is an executive member whereas the Clubs Development Officer is a paid employee. In other word's the Recreation officer can be considered a governor and the Clubs Development officer is a manager
- The Clubs Development Officer plays an operational role whereas the Recreation Officer plays more of a lobbying role
- The Clubs Development Officer is more suited to help you with your day to day operations
- The Recreation Officer

Important Dates

1 st of March 2018	OUSA Welcoming and Information Session
19 th of February 2018	Grants open for year
22 nd of February 2018	Semester One Clubs Day
14 th of March 2018	Clubs Training Day
16 th of March 2018	Re-affiliations Due
29 th of March 2018	Applications for Grants Round 1 Closes
11 th of April 2018	Affiliated Clubs Council Meeting
30 th of April 2018	Applications for Grants Round 2 Closes
1 st of June 2018	Applications for Grants Round 3 Closes
Date	Mid-Year Fling
TBC	Semester Two Clubs Day
TBC	Applications Close for Grants Round 1
10 th of July 2018	Blues and Golds Awards Nominations Open
17 th of July 2018	Blues and Golds Nominations Close
Date	Clubs and Societies End of Year Function

Engagement with OUSA Recreation

We endeavour to keep our clubs and societies informed and where appropriate consulted and involved. Our keys methods and platforms for this are listed below.

OUSA Website www.ousa.org.nz

Under the recreation tab you will find all relevant policies, guidelines and resources

OUSA Clubs and Socs Notices Facebook Group (closed group for committee members)

The Clubs Development Officer administrates this page; all you will need to do is request to join the page. It is designed for informing club administrators, gathering feedback and connecting clubs.

OUSA Clubs and Societies Facebook Page <https://www.facebook.com/ousaclubsandsocs/>

This page is administrated by the Recreation Manager. It is designed for informing users of the centre and clubs and societies and promoting and fostering recreation opportunities on campus.

Email

Our Clubs Development Officer will email out important notices to your club email. It is important that you supply the CDO with the best email for this and contact us if this changes. Email is one of the best methods to contact the CDO.

Affiliated Clubs Council

Affiliated Clubs Councils are chaired by the Recreation officer and facilitated by the CDO. These are held quarterly and give you a chance to connect with both staff and executive but also your fellow club administrators.

Pigeon Holes

If we have something really important we want to let you know we may leave you letter.

Clubs and Societies Noticeboard

We have a dedicated Clubs and Societies Noticeboard on ground floor of the Clubs and Societies Centre. This is just beside the water fountain. We will put important notices here for you such as grants round closing dates.

Open Door Policy and One-on-one's

Booking a meeting with us is the ideal scenario. We can make sure we are free to talk and secondly we'll be more prepared. However, if something pops up you can try your luck and rock on up.

Club Training Sessions

The CDO runs training sessions throughout the year. It's a good opportunity to learn more about a specific area and interact with fellow club administrators.

If you have you feel these is a better way, we could engage with you please let us know.

Affiliation

An affiliation is a connection to something. In being affiliated to OUSA we will recognize, support and provide a range of benefits for your group on campus. You will still remain a separate entity from OUSA and you will withhold your own governance and management. In saying that OUSA does have some specific requirements for affiliated clubs. These requirements are set for the primary purpose of creating safe and enjoyable experiences for our students.

Initial Affiliation

If you'd like to start a club that is distinctly different from those we already have, fosters recreation and culture on campus and is aligned with our values we'd like to hear from you!

Give the CDO an email to make an appointment to discuss your club.

Our Clubs Development Officer can guide you through this process but more or less you will need to:

- Come up with a club name
- Identify your key aims and objectives
- Rally together ten plus members, 90% of which are Otago University or Otago Polytechnic students
- Hold an inaugural meeting (see our inaugural meeting template)
- Type up a constitution (see our constitution template)

If the Clubs Development Officer is satisfied with your proposal they will put it on the agenda for the OUSA Student Executive general meeting. They will then approve or decline your application (perhaps hold if more information is required).

Re-affiliation

Re-affiliation

We ask clubs to re-affiliate every year. This is because our clubs change so much from year to year and it gives us a chance to touch base. On re-affiliation we ask clubs to update key information, submit AGM minutes and new membership list and if applicable any amendments to their constitution.

Re-affiliations do not go through the OUSA executive unless there is an amendment to your constitution.

Affiliation and re-affiliations are lodged online. If you are unfamiliar with the process, please talk with your CDO.

Club Status

Clubs and societies generally start with just a couple of people informally getting together. With growth this can drive a need for a more organised structure. This could be an unincorporated group or an incorporated society or charitable trust. We've noted some key points about each below.

Un-incorporated Clubs and Societies

Un-incorporated means you're not an incorporated society, charitable trust, business or other legal entity (recognized by NZ law). Most of our clubs start off and remain unincorporated. Generally, this works just fine rarely impacting the day to day operations.

Rules and Processes

As a matter of good practice, an un-incorporated group should record its rules and processes for managing the group's affairs and making decisions. These rules could be based on the group's past practice and should be agreed upon by all your members. Although there is no legal requirement* for writing down your rules, it will help your group operate smoothly and will also be useful if any disputes arise, especially if there are assets or money involved.

*Note OUSA has its own unique requirements for affiliation.

Key Advantages

- Fewer legal and administrative requirements
- More flexible structure, with fewer rules or restrictions

Key Limitations

- Members can be held personally liable
- No legal standing to enter into contracts, own property or borrow money

Incorporated Societies

An incorporated society is set up under the Incorporated Societies Act 1908. Once incorporated, it means a society can legally run its affairs as though it were an individual person. **The NZ Companies Office is responsible for administering the Societies and Trust Register that registers incorporated Societies.**

Rules and Processes

Incorporated Societies must have constitutions which include specific clauses under the Incorporated Societies Act 1908.

Key Advantages

- Members are not personally liable for debts and other obligations
- You may enter into contracts, own property or borrow money (noting the OUSA Affiliation Policy has its own requirements around this)
- You may be eligible for external funding

Key Limitations

- Additional legal and administrative requirements
- Your structure is less flexible, with more rules or restrictions

If your club is interested in being recognized as an incorporated society head to <https://community.net.nz/resources/community-resource-kit/process-for-setting-up-an-incorporated-society/> for more information

Charitable Trust

If you would like to become recognized as a charitable trust, you'll need to approach the Companies Office. **Charitable Trusts must act exclusively or principally for charitable purposes which are the advancement of education or religion, the relief of poverty, sickness or disability or any other purpose that benefits the community.**

Rules and Processes

Charitable trusts require a constitution however there is more flexibility in the individual clauses compared to incorporated societies.

Key Advantages

- Members are not personally liable for debts and other obligations
- You may enter into contracts, own property or borrow money (noting the OUSA Affiliation Policy has its own specifications surrounding this)
- You may be eligible for external funding

Key Limitations

- Additional legal and administrative requirements
- Your structure is less flexible, with more rules or restrictions

If you are interested in becoming recognized as a charitable trust head to <https://community.net.nz/resources/community-resource-kit/process-for-setting-up-a-registered-charitable-trust/> for more information

Committee and Roles

Governance is how an organisation (your club or society) is run. It covers all the strategies, systems, processes and controls that enable a group to decide what it will do and to make sure it happens. Good governance is crucial for your group because it enables you to look long term while making sure all your day-to-day stuff is sorted too.

Effective Governance – Make Your Club Successful

Good functioning clubs have:

- a good mix of skills
- an effective chairperson
- committees for specialist tasks e.g. social media, event planning, sponsorship
- well-managed meetings
- dynamics that allow free expression of different perspectives an effective chairperson, backed by a strong vision for the organisation and clear protocols, can make sure all perspectives are taken into account
- external support e.g. OUSA, Sport Otago, Dunedin Community Accounting
- good self-evaluation

Governance Verse Management

In basic terms, governance (your committee) is the role of leading an organisation providing direction, leadership and making decisions. Management take lead from their governors to implement the decisions they have made aka managing the day to day operations*. The governing body's role is to oversee management, not to manage it. This can be tricky particularly when roles are blurred or overlap. It's not uncommon within our clubs and societies for the same people to be involved in both leading and running the group. For example, you may be the vice president of your group but also the head coach or you could be the treasurer but also the team manager.

*A "real world" example of this is the OUSA itself. The OUSA executive may decide they want to put a swimming pool and spa in the Clubs and Societies Centre (hypothetical of course). It is then the Recreation Manager's responsibility to do further investigation reporting back to the CEO (who will keep the executive fully informed) and if feasible project manages the venture.

You're Committee

OUSA affiliated clubs and societies must have a minimum of three officers (roles) on their committee. These are:

- A president → who is in charge of leading your committee and representing the organisation
- A treasurer → who is in charge of keeping the organisation's finances healthy
- A secretary → who is in charge of administration.

All officers within your committee have a general duty to act in good faith and in the group's best interest as well as take reasonable care to exercise their duties. Officers will then have specialised functions, duties and powers as set out in your club's constitution. Some examples of these will follow.

Officers can be held personally liable under NZ law for committing crimes e.g. the theft of club equipment or finances or drink driving on a club trip. Officers or the club as a whole may be liable for breaching the OUSA affiliated policy.

President Duty Examples

In addition to his/her general governing body duties, the president represents your group to members, the general public, OUSA and other stakeholders.

The president's tasks may include:

- The ability to think long term for your club
- Be able to manage relationships
- Ensure risks to the organisation are managed
- Ensure that all committee members can contribute to debate and decision-making
- Manage governing body processes.
- Conduct efficient committee meetings
- Set annual meeting times
- Help prepare meeting agendas
- Distribute relevant information prior to meetings
- Ensure accurate recording of meeting decisions
- Represent the group to external stakeholders e.g. the Affiliated Clubs Council
- Make sure the governing body's resources are being well and appropriately used.

Treasurer Duty Examples

The treasurer oversees the financial administration of your club and society and reports to your committee. He/she is responsible for the group's finances, making sure they are clearly accounted for and that all reporting requirements are met. This means ensuring the club is currently in a healthy financial state, and also assuring its ongoing viability.

The treasurer's tasks may include:

- Ensuring that the finances of the society are managed appropriately
- Making recommendations to the committee about income and expenditure, investments and debts
- Keeping records of all incoming and outgoing payments
- Reviewing the annual statement of financial performance (profit and loss) and statement of financial position (balance sheet)
- Where applicable ensuring that the annual audit process is undertaken in a timely fashion according to legal requirements
- Providing regular financial statements to the committee and providing explanations where required
- Where applicable drawing up the annual budget in consultation with the committee and members
- Paying bills
- Managing the petty cash

Secretary Duty Examples

The secretary carries out administrative tasks for your group.

These tasks may include:

- Convening meetings and booking rooms
- Dealing with correspondence
- Preparing agendas for meetings (in consultation with the chairperson a.k.a. Your president)
- Taking the minutes of meetings
- Ensuring back-up information is available at meetings where required e.g. your club's constitution or the OUSA Affiliation Policy

Constitution

A club's constitution is a "rule book" by which your club operates. It sets out how you are run, how decisions are made and the procedures you will follow to ensure you are efficient, transparent and accountable to your members. Some of these processes are required by OUSA or the NZ law whilst others are at the discretion of your club.

Using your Constitution

Get to know your constitution! Read over it carefully and make sure others on your committee do the same. Highlight anything that doesn't make sense and bring it up with your fellow officers. If there is still confusion come in and see us. We highly recommend having a constitution on hand at all meetings as a reference document.

Amending your Constitution

Your constitution should be a working document, relevant and specific to your club. If the provisions within your constitution don't suit your club anymore amend, amend, amend. The best time to do this is your AGM (see AGM template) although if you really can't wait you could hold a Special General Meeting.

To kick things off refer to your current constitution around guidelines for special general meetings and constitution amendment's. If you breach your changes may be considered invalid. Make sure you allow for people to discuss the change and have a fair process lined up to vote. A secret ballot can be helpful for sensitive topics so people don't feel pressured to vote a particular way.

Some clubs have found their quorum is not working. They want to change it but can't make quorum to do so! (what a rut). If this sounds familiar come and see us. We can ask the OUSA executive to make a special dispensation given reasonable justification.

Meetings

Meetings are essential for discussions, sharing information, making decisions, solving problems and developing relationships. It is important to run meetings that are efficient and productive so you can reduce the amount you require and the time in each (freeing up time to do the actual activities you love).

There are a bunch of different types of meetings. We have listed the key types our clubs and societies use below.

Inaugural General Meeting

The Inaugural General Meeting is a club's first meeting. The goal of the first meeting should be simple and straightforward: Introduce students to your club mission and goals, introduce the members to the club's constitution and vote in your club's new executive positions. The club may also want to discuss some activities or projects which the club would like to do or inform their members of any relevant information.

Regular Meeting

A regular meeting is a meeting held by the club executive, and is generally held weekly, fortnightly or monthly to track business, and plan forward. For clubs this could be to evaluate an event, plan for club's day or another event, plan for new club equipment or plan for grants etc.

Special General Meeting

The special general meeting is a meeting that the club president can call at any time throughout the year to address any urgent matter if it cannot wait until the AGM. Urgent matters could include changing the club's constitution or electing a new executive officer.

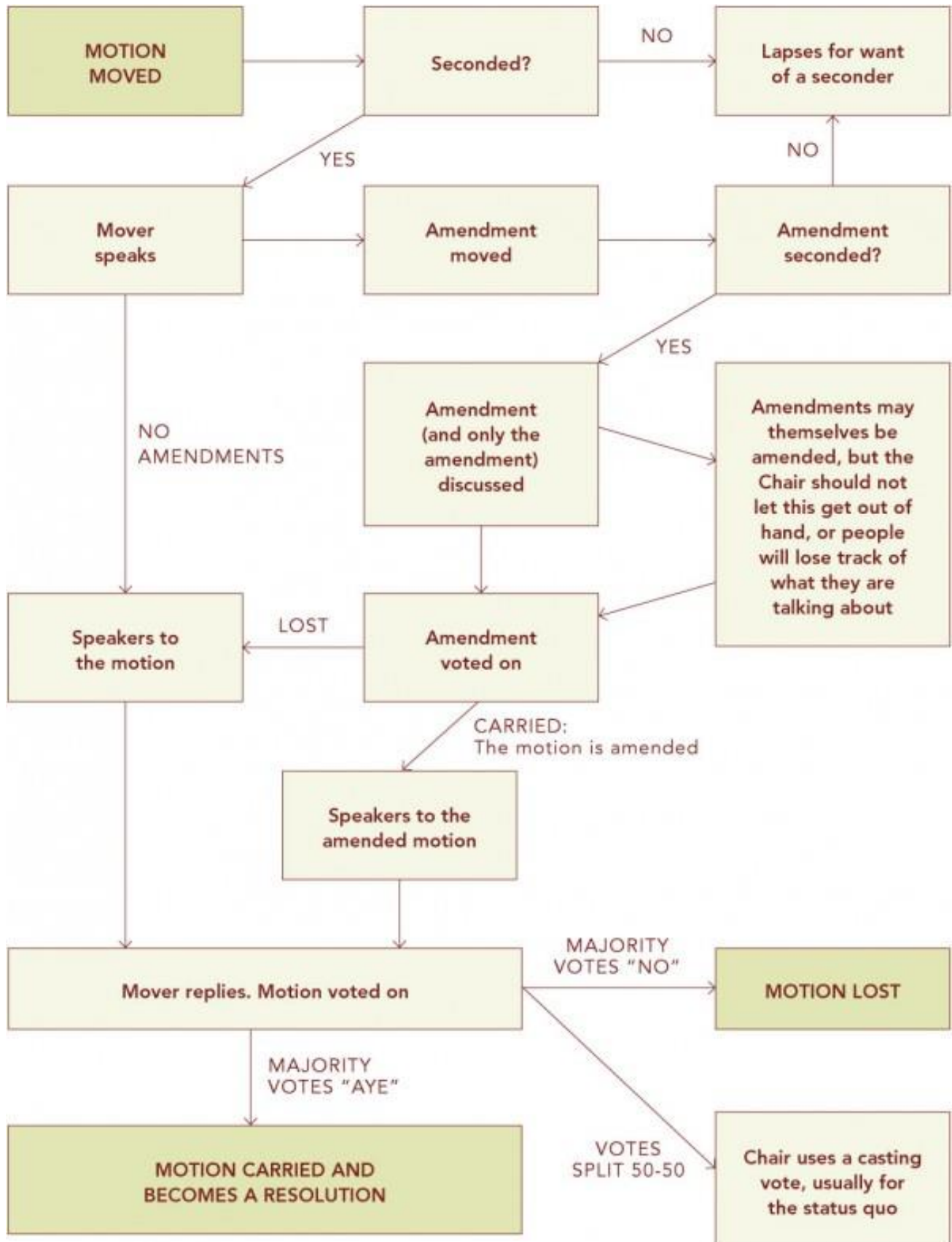
Annual General Meeting

An annual general meeting is a meeting held annually for all club members to attend. At the AGM the key items on the agenda will be the president's annual report, the treasurer's annual financial report both of which will be presented to the club, the club will elect their new executive positions for the following year, and possibility of changing the club's constitution.

Moving a motion AKA. Fancy meeting words

Ever wondered what these words mean? It is a whole new language and can be very confusing if you're not used to the meeting lingo when it comes to making decisions as a committee.

Check out the chart below to see how to use them! Still not sure? Come and chat with your CDO!



Annual General Meeting Template

The text in bold should be recorded. Additional text is for reference only. This template can be modified for use in general or special meetings.

AGM of _____

Date:

Time:

Venue:

Present:

(Print off your membership list, tick off those present, add additional attendees)

Apologies:

(members, officers, ex-officio or anyone else unable to attend)

Quorum: meet/not meet

Meeting opened by (presidents name) at _____ **am/pm.**

I declare the AGM for _____ club is now open

Presidents Welcome

It's a pleasure to welcome all of our club members and visitors along today.

Minutes

Distribute minutes of last AGM

Are there any amendments required to the last AGM minutes?

I motion the minutes are true and correct

Will someone second this?

All those in favour?

Motion carried that the minutes are true and correct

Matters Arising

Is there any business arising from the minutes?

Briefly discuss any topics raised

_____ was discussed

Financial Report

I now call on the treasurer to present the financial report

Distribution of annual financial statement

Annual financial report delivered by the treasurer:

- a. Purchases
- b. Grants/sponsorship
- c. Equipment purchases/hire
- d. Event budget summaries
- e. Account balances
- f. Debt owing
- g. Q and A and discussion

Would someone move that this report is true and correct?

Will someone second this?

All those in favour?

Motion carried that the financial report is accepted

Presidents Report

Distribution of presidential report

I will now present the presidential report

- a. Membership information, increases, decreases, demographics
- b. Yearly aim/s review, suggestions for continuation, amendments or deletion
- c. Yearly events review, suggestions for continuation, amendments or deletion
- d. Acknowledgements and thank you
- e. Q and A and discussion

Would someone move that this report is true and correct?

Will someone second this?

All those in favour?

Motion carried that the presidents report accepted

Election of Officers

The next item on the agenda is the election of officers

- a. Summary of positions
- b. Opening of nominations (including self-nominations) noting each must be seconded by a club member
- c. Nominee speeches
- d. Election by ballot/vote

I am very pleased to declare that the following people have been elected into the following roles...

President

Nomination: _____ seconded by: _____

Total votes: _____

Nomination: _____ seconded by: _____

Total votes: _____

Outcome:

Treasurer

Nomination: _____ seconded by: _____

Total votes: _____

Nomination: _____ seconded by: _____

Total votes: _____

Outcome:

Secretary

Nomination: _____ seconded by: _____

Total votes: _____

Nomination: _____ seconded by: _____

Total votes: _____

Outcome:

Constitution Amendments

The next item on the agenda is our constitution. Is there anyone who would like to amend our constitution?

_____ proposed the change to clause _____ in the constitution because of _____.
The proposed amendment is “ _____ ”

Would someone move the (proposed amendment) (that the constitution does not require amendment)?

Will someone second this?

All those in favour?

Motion carried that the (clause____constitution will be amended to _____) (the constitution does not require amendment)

General Business

The next item on the agenda is general business

Is there any general business? (correspondence from sponsors or the national sporting body etc.)

_____was discussed

Next Meeting

The next general meeting will be

Meeting Closed

Thank you for all those who attended today. If there is no further general business (is there?) then I declare this AGM closed.

Meeting closed by (presidents name) at_____am/pm.

Annual General Meeting Sample Agenda

- Welcome by Chairperson
- Apologies
- Confirmation of minutes from previous AGM
- Matters arising from the minutes
- Correspondence
- Chairpersons annual report
- Treasurer's report and presentation of financial statement
- Election of office bearers
- General business
- Guest speaker (if appropriate)
- Date of next meeting
- Close of meeting

Inaugural General Meeting Template

The text in bold should be recorded. Additional text is for reference only.

IGM of _____

Date:

Time:

Venue:

Present:

(names of those who have attended)

Apologies:

(those who wanted to attend but couldn't)

Quorum: meet/not meet

Meeting opened by (chairperson name) at _____ **am/pm.**

I declare the IGM for the proposed _____ club open.

Chairperson Welcome

It's a pleasure to welcome you all along today were we will be founding the _____ club

Club Name

I motion the club name to be _____

Will someone second this?

All those in favour?

Motion carried that the club name will be _____

Constitution

Distribution of proposed constitution

The proposed constitution is now up for discussion. Does anybody have any feedback? e.g. the membership fee is too low/high

I move the adoption of the proposed constitution

Will someone second this?

All those in favour?

Motion carried that the _____ club has adopted a constitution

Election of Officers

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- d. Election by ballot/vote

I am very pleased to declare that the following people have been elected into the following roles...

President

Nomination: _____ **seconded by:** _____

Total votes: _____

Nomination: _____ **seconded by:** _____

Total votes: _____

Outcome:

Treasurer

Nomination: _____ **seconded by:** _____

Total votes: _____

Nomination: _____ **seconded by:** _____

Total votes: _____

Outcome:

Secretary

Nomination: _____ **seconded by:** _____

Total votes: _____

Nomination: _____ **seconded by:** _____

Total votes: _____

Outcome:

General Business

The next item on the agenda is general business

Is there any general business? e.g. the president will contact the OUSA CDO to begin the process of affiliation

_____ was discussed

Next Meeting

The next general meeting will be

Meeting Closed

Thank you for all those who attended today. If there is no further general business (is there?) then I declare this IGM closed.

Meeting closed by (chair person's name) at _____ am/pm.

Health and Safety

As a club or society committee member you have accepted the responsibility of leading others. You have a 'duty of care' to your members, which means ensuring that they are not exposed to a foreseeable risk of injury, as far as is reasonably possible, in taking part in your group's activities.

Health and Safety Work Act 2015 (HSWA)

The Health and Safety Work Act 2015 sets out the principles, duties and rights in relation to workplace health and safety. Its primary goal is to give the highest level of protection from workplace health and safety risks, as is reasonable. It does this by making particular actions mandatory such as identifying, assessing, controlling and monitoring hazards. Under the HSWA everyone has a role to play e.g. it's not just the employer or president but the employee, club members and everyone else involved or impacted.

A dominant term in the HSWA is PCBU which stands for person conducting a business or an undertaking. This refers to businesses in general, governmental departments or agencies, councils, schools and organisations such as SPCA. A PCBU includes officers such as directors and board members.

What does this all mean for you?

The HSWA identifies clubs, societies and other non-for-profit volunteer organisations as PCBU's if you have one or more employees. If you have no employees, you will not be considered a PCBU. For the majority of our clubs you are then not recognized as a PCBU and therefore have no legal obligations under the HSWA.

You do however have obligations to OUSA in being an affiliated club, Otago University if hosting events on campus and lastly but most importantly moral obligations to your club members.

OUSA Health and Safety Expectations

OUSA expect the committee members of our affiliated clubs and societies to:

- Identify, assess and control hazards
- Involve and inform your members of the above processes
- Monitor identified hazards
- Ensure members have the appropriate safety clothing and equipment
- Ensure club equipment is fit for purpose

Your affiliation to OUSA may be jeopardized if we have reasonable grounds for concern over your club's health and safety management systems.

University of Otago Health and Safety Compliance

The University of Otago have their own specific policies, procedures, guidelines and codes of practice. You'll need to abide by these if you are operating on campus property e.g. hosting a cultural evening in an auditorium or running an expo in the link. Links to the key documents can be found below:

<http://www.otago.ac.nz/administration/policies/index.html?policy=Health>

<http://www.otago.ac.nz/proctor/otago085274.pdf>

OUSA Health and Safety Support

Keeping our students safe is our top priority. We are more than happy to assist you in developing and progressing your health and safety systems. We also have a variety of templates you customize to simplify things. If you require assistance, please contact your CDO. The CDO will get you sorted and or refer you onto others who may be better suited to offer you support.

If your club requires equipment which is health and safety related, you may be able to receive an OUSA grant. Refer to the raising funds section for more information.

Workplace First Aid Training Support

Workplace First Aid Training (WPFAT) are OUSA's preferred first aid provider. They are a local company who offer affordable prices, modern training equipment, relevant and professional instruction. WPFAT offer a variety of training including workplace first aid, comprehensive first aid, outdoor first aid, pre-hospital emergency care and a bunch of others.

WPFAT are so wicked they have offered a representative from each club and society discounted spot (\$35) in one of their workplace first aid or comprehensive first aid courses. If you would like to take up this amazing offer, you'll need to provide the Recreation Manager the minutes from a general meeting motioning who you have selected from your club. Be smart with who you select e.g. it makes sense to select someone who will take a hands on leadership role such as an outdoor leader.

For more information about WPFAT head to <http://wpfirstaid.co.nz/>

Additional support for first aid training may be available through our grants system. Contact your CDO for more information. Note first aid training is something we think everyone should have (irrelevant of your club membership status). Get the word out! #firstaidsaveslives

New Zealand Mountain Safety Council (MSC)

MSC is a national organisation with a mandate to encourage safe participation in land-based outdoor activities. Their website is really engaging and has a bunch of resources which are invaluable for clubs and societies who want to get into the outdoors. They also have some really great videos on YouTube.

<https://www.mountainsafety.org.nz/>

<https://www.youtube.com/watch?v=W2hcLaiW9C8&list=PLeLnlpLtcKodTaLnO-53RmTNSCUHjIxa>

University of Otago Health and Safety Support

The University of Otago have a dedicated team to develop and maintain health and safety systems and provide a safe workplace for staff, students and visitors. The Health and Safety Advisor (Nevan Trotter) is happy to offer advice to our Affiliated Clubs and Societies. This could be anything from a quick call with a specific question to scanning over your hazard register. You can contact Nevan on 479 5389 or nevan.trotter@otago.ac.nz

WorkSafe

WorkSafe New Zealand is the work health and safety regulator. One of their key functions is to provide guidance, advice and information on work health and safety. Their website <http://www.worksafe.govt.nz/worksafe/> provides a good amount of this however you may want to talk to someone directly.

If you have a general enquiry for WorkSafe NZ you can contact them on 0800 030 040 or info@worksafe.govt.nz

Finance and Budgeting

One of the most essential parts of running a successful activity group is effective budgeting. You'll need to learn how much things cost and make sure you end the year without spending more than you started with.

IRD Number

If you're going to open up a bank account, you're probably going to need an IRD number. To do this you will need to fill out a non-individual IR596 IRD number application form and send it through to IRD. This form can be found here

<http://www.ird.govt.nz/resources/6/e/6ec844b1-4b59-4b33-8524-f3fdec3eacbd/ir596-2017.PDF>

GST and Income Tax

Some non-profit organisations (like most of our Clubs and Societies) may qualify for a \$1,000 income deduction from IRD.

If your club has a net income below \$1000 per year this effectively means you are exempt from income tax. Therefore, you won't be taxed on any income you earn and don't need to file any income tax returns. You should however still keep records of any financial transactions that have occurred. This scenario will fit most of our clubs and societies.

If your club has a net income above \$1000 per year, you may be eligible for a deduction of up to \$1000. If you subtract this amount from your club's income, you'll reduce the amount of tax you'll need to pay. You'll need to apply for this deduction through IRD who will request some additional info about your club. We recommend talking to them directly as each club's situation will be slightly different. If you have hiccups along the way get us involved.

For more information about your clubs legal financial obligations head to www.ird.govt.nz/non-profit

Dunedin Community Accounting (DCA)

Dunedin Community Accounting offer free accounting advice for non for profit organisations needing help with budgets, accounts or financial reporting. These are in the form of "open hours" during each Monday and every second Wednesday along with occasional evening workshops. This is an invaluable service for clubs and societies treasurers*. Bookings are necessary but the process is really easy. For more information or to place a booking head to <http://dca.org.nz/>

*Note DCA periodically run specific seminars for treasurers. These will be listed on their website and we will do our best to promote you through our own communication channels.

Otago Chamber of Commerce

With support of the Otago Community Trust, the Otago Chamber of Commerce offer low cost non for profit training (generally \$40) tailored for community groups. Alongside treasurer's responsibilities and accounting for non-accountants they also offer courses such

as social media, conflict management and effective communication. For more information head to www.otagochamber.co.nz

Raising Funds; Self-Funding

At some point in time you'll want to raise funds. Raising funds, like most activities is easier if you have a plan.

Plan Like a Pro

- Why are you fundraising? What is your purpose? It is always easier to fundraise for a particular project e.g. national championships than everyday costs
- Do you need to fundraise? Instead of purchasing something could you hire it or perhaps borrow from another club?
- Does your committee have enough time to organise this project or do you need a subcommittee?
- Complete a budget. There's no point in fundraising if the exercise is going to cost you money. Make sure if you're selling sausages, you're pricing them correctly to cover your costs and allow for some "man over boards" and unsold product. Also think more broadly and make sure you're not missing misc. items like hand sanitiser or oil.
- Set realistic time bound goals e.g. world champs might be six months away and your registration fees could be due in three. You might also need to book accommodation and flights in advance. Can you raise enough money for the initial costs? Can you raise enough for the total project? It's worth noting applying for grants is a LONG process. Chances are if you require the money in a month you're already too late.
- Who will you approach? This can have a big impact. Students may be more sympathetic to your cause but have little disposable income.
- How will you fundraise? Self or external?

Funding Options - Self-Funding

- Membership fees; these are not compulsory but your club does have the power to set these. Set to low you may be missing a funding opportunity, set to high you may turn off members.
- Tickets for events or activities e.g. a cultural night or showcase
- Various others e.g. sausage sizzles*, stadium clean ups, bake sales, scratchy trees, working bees etc.

We can provide you support to develop these within your group.

*Sausage sizzles and food stalls do not require a permit from the council where they are for the purposes of fundraising for a non for profit organisation. You do however have a responsibility to make sure the food you provide is safe and suitable

Raising Funds; External Funding

You are probably wondering how your club can get their hands on some extra funds, and there are a number of ways in which your club can source money...

Donations; these could be from individuals or businesses in the form of cash or "in kind". "In kind" is a term used for free services e.g. free or discounted physio or donated goods like old or discontinued merchandise from a store. Try and make it easy for people to donate e.g. add a donate button to your website or supply donation boxes at events

- Sponsorship; this is a two-way agreement where a company offers cash, product or service for recognition or promotion within your club. More details on sponsorship follow below.
- OUSA Grants
- Crowd sourcing
- External Grants e.g. those from community trusts

Additional Sponsorship Information

You will need to clearly outline the potential benefits from an association with your club to a prospective sponsor. Long story short if they don't see a benefit they won't sponsor you. Push for benefits such as brand exposure and increased sales.

Create a sponsorship strategy – don't run around like a headless chicken

- identifying activities suitable for sponsorship
- writing a clear summary of, and budget for, the proposed activity
- identifying potential benefits for the sponsors
- establishing the value to the sponsor
- identifying potential sponsors and selecting who you will approach
- writing the sponsorship proposal
- approaching the sponsor, and
- follow-up with the sponsor (this is key, especially if you want ongoing sponsorship)

Push the benefits

- Brand exposure; stick their logo on everything (clothes, promo material and social media)
- Public recognition; specific shout outs on social media or during live events
- Allow the sponsor to use photos of events for their own promotions
- Distribute the sponsors advertising material to your members
- Offer a free motivational speech from a top notch athlete in your club

- Offer a free trial session for their employees or discounted membership

Additional Grants Information

In addition to OUSA grants there are external grant providers for which you may be eligible to apply. The best advice we can give you for this is you will get as much as you give (in terms of effort) and you will need to be extremely organised. External grants are in no way a hand out but for those who are willing to put the work in you may reap some great rewards. The key funding providers (or tools to seek these out) are:

<http://www.sportnz.org.nz/get-into-sport/search-for-funding/search>

<http://www.dunedin.govt.nz/services/dcc-funding/funding-and-grants>

<http://www.oct.org.nz/>

<http://www.communitymatters.govt.nz/Funding-and-grants---Lottery-grants>

<http://www.communitymatters.govt.nz/Funding-and-grants---Crown-Funds>

<http://www.oct.org.nz/resources/other-funders-and-funding-information>

Events

OUSA Clubs and Societies are known for their thriving events and activities. We encourage this and are all behind you (as long as it's safe and enjoyable for those participating). To assist you in your event planning we've listed some key considerations below.

- **What is your event purpose?** e.g. to fundraise, increase membership, celebrate membership achievement, protest or perhaps engage with the general public
- **Who is your target audience?** e.g. if you're looking to fundraise groups may have more disposable income than others or if you're looking to engage with the general public you might want to choose a venue outside of campus
- **What is your timeline?** When would you like to run your event? Does this give you enough time to plan (can you plan everything necessary before this date)? Does your timeline work for your target audience? e.g. how might your event be affected by semester breaks, exam periods, existing sporting competitions or other one off events? Is there a suitable venue available at this time? Will you have enough time to promote your event? What is the timeline of the event itself for example most medium scale events have "run sheets"? As a general guideline we recommend allowing a month for a small event and three months for a medium scale event
- **Where will you hold your event*?** There are lots of great venue's on and off campus. Make sure you ask clarify all their costs. Never sign a venue hire agreement until the rest of your committee have looked over it. Some venue's leave out additional costs such as set up fees and add on's like A.V. gear or cutlery.
- **What resources do you require?** This could be people, equipment or facilities. Try and think past the obvious. For example, toileting, parking and rubbish is often overlooked but essential
- **What is the budget for your event?** What are all of your expenses and income? Are you relying on income from sales? What happens if you don't sell what you expected? Remember it's always better to over predict your expenses and have a misc. line for unexpected items
- **What kind of risks might exist within your event?** Once again over reaching is always better chances of this happening and what you are going to do to manage this. Remembering that risks don't just exist at the event but the lead up to e.g. transportation to or the post clean up
- **How are you going to promote your event?** How much do you need? When do you start? Are there any specific deadlines e.g. one months-notice plus for the OUSA bollards and T.V. screens?
- **Does your event have any legal obligations?** Do you need traffic management? Perhaps you need to apply for a special liquor licence. What is the occupancy cap. of your venue?

- **What is your emergency plan?** If there was an injury, fire, gas leak, aggressive behaviour, unwanted media attention or another form of emergency what would you do? Would you have the resources to deal with it? Who would you call for help?
- **Do you need a contingency plan?** Is your event weather or ticket sale reliant? If these fall through what will you do e.g. cancel or postpone the event or perhaps move the event indoors
- **What will you do after the event?** Will you have evaluated how successful your event was? How can you do this e.g. number of sales, increased membership, amount of money raised, amount of people injured. If successful and your club may run it again we suggested recorded everything down e.g. suppliers, what venue you choose, what grants you applied for etc. This will make the lives of future committee members sooooo much easier.

*In addition to the Clubs and Societies Centre there may be alternative venues on campus which you can use. For more information and to place bookings for Otago University Venues head to:

<http://www.otago.ac.nz/externalbooking/>

You may be eligible for a hire fee waiver. To inquire about this please email please email timetables@otago.ac.nz

Promotion

There are endless ways to promote your club. We have listed the most common forms for tertiary groups at Otago below.

Clubs Day

There is a Clubs Day each semester during mid ori. week or re-ori week. These are generally held in the Link, MCR or Union Lawn. It's the best time for your group to promote yourself to thousands of students who are looking for activities to get involved in. Space is restricted therefore pre-registration is required in advance through our Clubs Development Officer.

Social Media

Social media platforms like Instagram and Facebook can be a really effective way of generating interest in your group and engaging with members. We recommend that you set up a Facebook page (or other relevant account) with a committee member taking the lead in maintaining and overseeing your social media profiles. Some important tips to remember are:

- A group social media account is not the same as a personal one! Don't post messages that are unsuitable for a wide audience.
- You should always be mindful that the information you give on social media does not bring the Students' Union, University, your individual clubs and players into disrepute.
- Never use language that could cause offence in posts. Facebook pages and Twitter are public and can be seen by anybody.
- Avoid posting negative posts, e.g. "It's disgraceful that none of you turned up to training last night". Negative posts or messages have a detrimental effect on your image as a group and will not engage members.
- Do not post photos or videos that could cause offence or compromise the reputation of yourselves, your members, or anybody else.

External groups like potential sponsors and OUSA may look at your club's social media profiles and these may reflect (positively or negatively) on you personally. Don't post anything on your group's social media accounts that you wouldn't want potential sponsors, employers, family members or us to see.

Websites

A website may be appropriate for some clubs. For those that are interested in this option there are several free website builders that should satisfy your requirements. OUSA recommends <https://www.wix.com/> and <https://www.weebly.com> in particular.

Posters

Let's start with poster design! For those of you who don't have experience with software such as adobe OUSA highly recommend www.canva.com . This is a free online platform that can help you design basic posters, social media posts and invitations amongst a bunch of other things. Once you've got your poster you'll want to stick it up somewhere. Here are a few options:

- Campus noticeboards; these are spread throughout uni. and are generally cleared on Friday. So best be wise and stick things up on Monday.
- OUSA Clubs and Societies Noticeboards; these are spread throughout "Clubs and Socs" and cleared periodically
- OUSA bollards and pin boards; OUSA have several bollards and pin boards throughout campus and within residential halls. OUSA Recreation as a department have a specific allocation most weeks of the academic year. We generally have enough going on to fill these spots however if you give us a good amount of notice e.g. a month plus we should be able to give you a small allocation. If you are interested in this please contact the Recreation Manager at michaela@ousa.org.nz

OUSA Digital Screens

The OUSA has digital screens located around campus and within OUSA facilities. Space permitting these are available for affiliated clubs and societies to use for special promotions e.g. an upcoming cultural evening. To advertise on the digital screens, you will need to:

- Produce content that is 1920W by 1080H (landscape) or 1080 by 1920H (Portrait)
- Have content which contains the appropriate OUSA affiliated club or society logo (available at www.ousa.org.nz/recreation/)
- Send the content through to the OUSA Marketing and Communications team (michaela@ousa.org.nz)

Like the OUSA bollards and pin boards you will need to contact us well in advance. Our marketing and communications team are very busy and may not receive correspondence for a few days after you send it through.

OUSA Market Days

For a couple of magical days, a year, the Union Courtyard (that's the area outside all the campus food stores) is turned into an eclectic shopping centre. There are various stalls, food trucks and live music. If we have a ripper of a day, the market attracts some great traffic. There is generally a small fee to host a stall however our affiliated clubs and societies can ask for a waiver. The OUSA Market Days are coordinated by our Events Department. If you are interested in attending, please contact them directly at oli@ousa.org.nz

Critic Magazine

The Critic Magazine covers a wide range of issues and topics relevant to students at Otago University. It is distributed on a weekly basis (on Sundays) all over campus and is entirely free. Critic provides a free notice service for all Otago University Students and affiliated clubs

and societies. If you would like to send something through email it to critic@critic.co.nz by 5pm Monday in the week before publication. Please use the following format:

Title

Summarized content (1 – 2 paragraphs only)

Details for further info. e.g. website addy. or Facebook page

If you have an idea for something more elaborate e.g. a feature, contact the magazine well in advance e.g. at least a month in advance

Healthy Campus Magazine

The Healthy Campus Magazine is a joint publication between OUSA Recreation and Otago University Recreation Services (aka. Unipol). It highlights all of the recreation opportunities on campus including but not limited to the recreation programme, affiliated clubs and societies, social sport, intercollege sport, facilities and group fitness. There are roughly 7000 copies distributed each semester. It is a vital tool to promoting your club. If you would like your club to make an appearance, we will need to receive the relevant information by early May and early October respectively. This generally includes your club name, best contact method e.g. Facebook and a good description (limited to 60 words). There is also an opportunity to submit a photo of your club in action. Your CDO will generally put a call out for this and the information will be collected via a Wufoo form.

OUSA Clubs and Societies Centre Facebook Page

We have a dedicated Facebook page for the Clubs and Societies Centre <https://www.facebook.com/ousaclubsandsocs/> This has just under 2000 people who like and follow the page as well as awesome engagement stats. On the page we notify students of our own upcoming events, other recreational opportunities on campus and in the wider community, share general notices e.g. changes to general operating hours and most importantly promote what our clubs and societies are up to. If you would like us to promote something your club is going please message the page or email michaela@ousa.org.nz

Don't forget to like and share our page so we can engage more students!

OUSA Facebook Page

OUSA has a "main page" <https://www.facebook.com/OtagoUniversityStudentsAssociation/> with a whopping 25,000 plus followers. This page is content heavy representing all the areas of OUSA including events, governance, students support, recreation, student freebies and deals and heaps more. If you would like to promote something on here it will need to be extra special and fired through to our marketing and comms. team well in advance. Please don't be upset if we can't accommodate you on this page (we will be able to get you on our specific one if this is the case).

Don't forget to like and share our page so we can engage more students!

Clubs Training Workshops

Throughout the year your CDO runs a number of clubs training days, with workshops focusing on different but relative areas...

Committees Role and Meetings: As a minimum your club will probably have a president, secretary and treasurer. Ideally these roles will have a cross over period with the previous person in that position (however that's not always the case). If you've been appointed/thrown in the deep end and don't have a clue as to what you're meant to do, then this course is for you. We'll cover what committees are, the common roles within committees and how to run great meetings (including annual general meetings or "AGM's").

Grants: Grants can sometimes seem mysterious and technical, and it can seem if it takes some kind of magic mojo to obtain them. For this course we'll break everything down nice and simple for you. We'll introduce you to the process of applying for grants (for groups/clubs or as an individual). You will learn what a grant is, which organisations you can apply to for funding from, eligibility, what organisations look for, how grants are processed, grants criteria, when to apply, making complaints, how to say thanks and a bunch of helpful hints.

Events: Is your club looking to establish an in house, local, regional or national competition? Perhaps you're looking to host your first ball. Either way this course is for you. We'll talk about establishing an event from the ground up including budget setting, venue hire, health and safety, volunteers, resource requirements, consents and permits, insurance, parking, security, waste management, lighting, food, first aid, contingency plans and much more.

Fundraising: Fundraising can sometimes seem boring, awkward or in some cases not worth the time but it needn't be. Fundraising can be fun, boost morale and provide that all important cash. In this course we'll talk about fundraising basics supporting by some fun and unique ideas for pulling it all together. If you're sick of doing another sausage sizzle or eating those Cadbury bars you're meant to be selling, then this course is for you.

Legal Considerations: The words 'legal requirements' need not be daunting. This course will cover the main legal issues clubs should consider including the privacy, accident compensation, liquor licensing, employment law, tax obligations and health and safety.

Marketing and Communication: This course will cover the what? Why? When? Who? And How's of communication so that you can market your message effectively. We will cover both traditional and untraditional forms of marketing in formal and non-formal settings to both external audiences and "in house" members. There will be a strong focus on how to take advantage of OUSA media and Otago University platforms.

Jump onto www.ousa.org.nz/recreation/courses-and-tournaments/ and register before they fill up!

If you can think of any other workshops we could hold let us know!

Room / Venue Booking

Each year OUSA affiliated clubs and societies have access to two regular room bookings in the OUSA Clubs and Socs building. Your CDO will send you an email about this at the beginning of each year OR when you become affiliated to OUSA.

Bear in mind that 5pm-8pm on week nights is a peak time for room bookings for both clubs and the OUSA recreation programme, so if you do not need a peak hour booking, do not request it.

Alternatively you can make one off room bookings through the following link <http://www.ousa.org.nz/recreation/room-bookings/>

There are also a range of venues on the university campus which you can use, you can request these through the following link <http://www.otago.ac.nz/externalbooking/>

Blues and Golds Awards

Recognition at the University of Otago Blues and Golds Awards is the highest honour OUSA can present to students who have excelled in sport, culture or services to these. There are specific awards set aside for our clubs in addition to many more which your individual members may qualify for.

Here are the awards:

- OUSA Club of the Year
- OUSA Society of the Year
- OUSA Cultural Society of the Year
- University of Otago Blues Award
- University of Otago Gold Award
- OUSA Outstanding Contribution to Arts and Culture Award
- OUSA Silver Service Award
- University of Otago Sports Woman of the Year Award
- University of Otago Sports Man of the Year Award
- University of Otago Maori Sports Person of the Year Award
- OUSA Outstanding Member of the University Community Award
- OUSA Outstanding Member of the Dunedin Community Award

For more information on each award and the process of nomination and selection process head to <https://www.ousa.org.nz/recreation/blues-and-golds> or email your CDO for more information sarahtaylor@ousa.org.nz

Coaching

Coaches are one of the key pillars for sporting clubs often playing out additional roles such as mentors, confidantes, motivators and cheerleaders. Although we don't hold internal workshops for coaching Sport Otago do and there is hoard of great information online with Sport New Zealand and Sport Tutor. We also strongly encourage building relationships with your National and Regional Sporting Organisations who may provide more targeted support for your chosen area.

Sport Tutor

Sport NZ have developed an online training tool called Sport Tutor (www.sporttutor.nz) Which offers free courses in some of the foundation skills that coaches and administrators need. It covers subjects such as "Getting Started in Coaching", "Sport Safe" and "Coaching Safety Net", which you can do at your own pace. Once registered, you will also have access to e-learning, templates, reference materials, and group learning tools.

Sport Otago

Sport Otago have a dedicated Community Coach Advisor (currently Mike Weddell). Mike offers coach education sessions throughout the year including getting started in coaching, programming and planning, understanding your athlete, self-development, sport nutrition, mental skills, strength and conditional and the NZ coach approach. Given enough notice they can also be provided on request. These courses are all free or have a small fee (generally \$5 or \$10). For more information head to <http://www.sportotago.co.nz/sport-1/coaching-1>

Sport New Zealand

Sport New Zealand has a hub of information for both beginner and experienced coaches. Head to <http://www.sportnz.org.nz/get-into-sport/coaching-guide/> for more information.

Nation and Regional Sporting Organisations

To find your national or regional sporting organisation head to <http://www.sportnz.org.nz/get-into-sport/find-a-sport/>

