

CLUBS POLICY & PROCEDURE

PROCEDURE TYPE	OPERATIONS
APPROVING AUTHORITY	ONTARIO TECH STUDENT UNION BOARD OF DIRECTORS
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1. INTRODUCTION AND SCOPE

1.1 INTRODUCTION

The Ontario Tech Student Union (OTSU) supports the creation and operation of Student Union Clubs as an essential part of student life. These student-led groups play a vital role in enriching the campus experience by fostering environments where students can build community, explore shared interests, and grow as leaders. Through their efforts, clubs contribute to the OTSU's mission of supporting student voice, value, and vision.

Student Union Clubs promote engagement through social, cultural, educational, and philanthropic activities that reflect the diversity and interests of the student body. OTSU recognizes and encourages these contributions and is committed to providing the structural and administrative support required for their success.

1.2 SCOPE

This manual outlines the official policies and procedures governing the operation, ratification, funding, and expectations of OTSU-recognized clubs. It serves as a comprehensive guide for club executives, members, and prospective student leaders to ensure accountability, transparency, and inclusive excellence within the Ontario Tech University student community. The Student Union retains the right to modify or update any information in these procedures without prior notification.

1.3 DEFINITIONS

For the purpose of this manual, the following definitions apply:

“Account”

Refers to the account provided to all clubs by the Student Union for financial transactions.

“AGM (Annual General Meeting)”

Refers to a yearly meeting of members hosted by either the Student Union or a Club.

“Applicant”

Means an individual from a ratified OTSU Club or Society seeking to use University Space. The Applicant is leading the planning and implementation of an Event and is considered a University Member who is:

- An executive member of a ratified OTSU Club or Society; or
- A general member of a ratified OTSU Club or Society.

“Campus”

Refers to the physical north and south locations of Ontario Tech University.

“Club Event”

Refers to a gathering open to all Ontario Tech University students, organized by a ratified Club or Society..

“Club Executives”

Refers to students who manage club activities. Eligibility: Must be Ontario Tech University students who have paid their ancillary fee.

“Club General Members”

Refers to students who join and participate in club activities. Eligibility: Must have paid their ancillary fee and participate in at least 20 hours of club activities annually..

“Club Training”

Refers to mandatory training for all Club executives. Failure to complete this without prior communication with the Clubs & Societies Department may result in sanctions.

“Clubs & Societies Department”

Refers to the department responsible for the governance and support of ratified Clubs and Societies.

Components include:

- Clubs & Societies Committee
- Vice President Student Life
- Member Engagement Manager
- Member Engagement Coordinator

“Event”

Refers to any short-term organized activity, meeting, display, or form of public address by a User within or on University space.

“Event Form”

Refers to an online form submitted to the Clubs & Societies Department for approval before hosting an event.

“External Organization or User”

Refers to a person or organization that is not considered a University member.

“External Service Provider”

Refers to any organization providing goods and/or services. This includes but is not limited to catering, equipment rentals, photography, animal therapy, décor, and transportation.

“Faculty”

Refers to a group of academic programs within a specific discipline at Ontario Tech University.

“Ledger”

Refers to account summaries provided by the Finance Generalist, used to verify budget details like grant funding, account funding, and sponsorships over the fiscal year.

“Member Engagement Coordinator”

Refers to a staff member authorized by the Board of Directors to oversee the Clubs & Societies Department and ensure the Board’s vision is implemented. This person ensures club policies are followed and exceptions are documented and approved. In their absence, the Manager of Student Engagement assumes this responsibility.

“OTSU or Student Union”

Refers to the Ontario Tech Student Union.

“Quorum”

Refers to the minimum number of members required for a meeting to be valid. Requirement: Fifty percent (50%) plus one (+1).

“Ratification”

Refers to the formal recognition of a Club by the Student Union, granted through approval from the Clubs & Societies Department and verification by the Clubs & Societies Committee.

“Ratified Club or Society”

Refers to a voluntary student group that has completed the ratification process and has been approved and verified by the Clubs & Societies Committee.

“Risk”

Refers to the assessment and management of physical, financial, and organizational risks, including measures to minimize their impact.

“Society Event”

Refers to a gathering open to all Ontario Tech University students, organized by a ratified Society.

“Space”

Refers to any location owned, leased, rented, or otherwise occupied by the University and made available for temporary use.

“University Member”

Refers to any individual who is:

- Employed by the University;
- Registered as a student, in accordance with the academic regulations;
- Holding an appointment with the University, including paid, unpaid, or honorific appointments; or
- Otherwise subject to University policies due to specific policy requirements or contractual terms.

2. CLUB RECOGNITION AND GOVERNANCE

This section outlines the overarching policies and procedures that govern clubs at Ontario Tech University, including foundational expectations, club formation (ratification), and ongoing verified club responsibilities.

2.1 GENERAL CLUB GOVERNANCE

The Ontario Tech Student Union implements up to 75 unique ratified clubs to ensure meaningful engagement and represent a purposeful mission.

2.1.1 Policy: General Club Guidelines

- Clubs must be unique and not replicate existing OTSU clubs or services.
- Ratification of all Clubs must follow the OTSU Ratification Procedure
- Ratified Clubs must follow all OTSU and University Policies and Procedures.
- Clubs may not include athletic activities; these groups should apply for Club Sport status with Campus Recreation as per the Ontario Tech University Policy

2.1.2 Policy: Unique Club Mandate and Categorization

All clubs must demonstrate a clear, distinct mission. OTSU evaluates uniqueness based on:

- Distinct objectives from existing clubs.
- Contribution to the broader student experience.
- Collaborative potential.

Acceptable Categories:

- Academic
- Social
- Professional Development
- Cultural or Religious
- Arts and Performance
- Advocacy and Community Service

2.1.2 Procedure: Demonstrating Uniqueness

Prospective clubs must submit a mission statement during the ratification process that:

- Describes club objectives and uniqueness
- Explains how the club benefits the university and OTSU community
- Identifies the target audience
- Describes proposed events and initiatives that directly relate to the club

2.1.3 Policy: Club Eligibility

To be eligible for ratification, clubs must meet the following criteria:

- **Good Standing:** Returning clubs must be in good standing, with no outstanding sanctions or disciplinary issues from the previous year.
- **Demonstrated Value:** Clubs seeking re-ratification must show they provided value to the student body through past initiatives and activities. Clubs that were ratified but held no events or engagements will not be eligible for re-ratification.
- **Value Proposition:** All clubs must clearly outline how they plan to bring value to the student experience through their goals, events, and engagement strategies.
- **Open Membership:** Clubs must be open to all students. No club may impose restrictions or barriers to membership based on academic program, background, or other criteria.
- **Unique Purpose:** Clubs must be unique in name, purpose, and mandate. Proposals that closely resemble existing clubs in theme, membership, or course focus will be denied.
- **Priority Approval:** Ratification is reviewed on a first-come, first-served basis, with priority given to returning clubs in good standing that demonstrated success and a positive impact in the previous year.

2.2 CLUB FORMATION – RATIFICATION PROCESS

2.2.1 Policy: Ratification Eligibility and Requirements

To be eligible for ratification, a new or returning club must:

- Have all executives be registered Ontario Tech University students who have paid the Clubs & Societies fees in full.
- Ensure the club's name is respectful and does not use "society."

- Have a unique purpose and not replicate existing clubs, services, or programs.
- Ensure that the club's mandate does not endorse activities that violate OTSU or university policies or applicable laws.
- Open membership to all Ontario Tech University students who have paid the Clubs & Societies fees.
- Restrict executive positions to eligible students (with optional limit of 2 executive roles per student).
- Not charge membership fees (unless granted an exception).
- Not be sport-based or involve high-level physical activities.
- Not allow OTSU staff, faculty, or officers to hold executive roles or be members.
- Be required to host at least 2 events per semester, including 1 initiative per year that benefits the student body as a whole.

2.2.1 Procedure: Applying for Ratification (New Clubs)

Students seeking to start a new club must submit a Club Ratification Package online by September 30th. The package must include:

A respectful club name reflecting its purpose;

- Assigned Club category;
- General club email address;
- Mission Statement outlining goals, objectives, and unique purpose;
- Community impact statement describing intended initiatives;
- A minimum of 4 planned events (excluding general meetings; 1 initiative must benefit the student body as a whole.); and
- A projected budget.

Executive Requirements:

- At least 4 executive members: President, VP of Events, VP of Communications, VP of Finance.

General Member Requirements:

- At least 10 general members, not including executives.

2.2.2 Policy: Re-Ratification of Established Societies

Returning clubs must demonstrate previous engagement, impact, and adherence to all OTSU policies.

2.2.2 Procedure: Applying for Re-Ratification (Existing Clubs)

Ratification requests are processed on a first-come, first-served basis. Returning clubs that remained in good standing and demonstrated a history of success and meaningful contributions to the student community will be prioritized.

Returning clubs must submit a Re-Ratification Package online by September 30th, including:

- A respectful club name reflecting its purpose;
- Assigned club category;
- General club email address;
- Mission Statement outlining goals, objectives, and unique purpose;
- Community impact statement describing intended initiatives;

- A list of 4 events from the previous academic year (1 must serve and engage the student body on campus as a whole)
 - Our aim is to bridge the gap across campus between individual clubs and the wider student body to foster a more connected campus community.
- A minimum of 4 planned events (excluding general meetings; 1 must benefit the student body as a whole.); and
- A projected budget.
- Minimum 4 executives (President, VP Events, VP Communications, VP Finance)
- Minimum 10 general members (excluding executives)

Account Balances:

Re-Ratification Packages must be submitted by September 30th of the new year to retain any account balances that are not Base or Grant Funding from the previous year.

Failure to submit by this deadline relinquishes rights to any remaining account balances..

2.3 EXPECTATIONS FOR VERIFIED CLUBS

2.3.1 Policy: Club Involvement

To maintain active status and good standing, clubs are expected to demonstrate consistent involvement and engagement with the student community:

- **Minimum Activity Requirement:** All ratified clubs must hold a minimum of two events per semester. These events can include academic, social, cultural, or community-based initiatives that align with the club's mandate and enhance the student experience.
- **Ongoing Engagement:** Clubs must maintain a visible presence on campus or online through programming, collaborations, or outreach. Inactivity may result in suspension or denial of future ratification.
- **Open and Inclusive Participation:** All events must be open to the broader student body and designed to be inclusive and accessible.
- **Value Alignment:** Club activities must align with their stated purpose and demonstrate how they contribute to a vibrant and diverse campus life.

2.3.1 Procedure: Good Standing Criteria

To remain in good standing, Clubs must:

- Complete at least 2 events per semester
- Complete mandatory club training
- Submit a General Member List by March 31st
- Send 2 executive members to the OTSU AGM
- Reply to communications from the Student Union in a timely manner
- Submit required event forms and documentation
- Comply with the Clubs Policy and Procedure, Clubs Financial Procedure, and OTSU Bylaws

Monitoring: Semesterly reviews will identify clubs at risk. Inactive clubs may lose base funding unless an appeal is submitted and approved.

2.3.2 Policy: Annual Club Reflection and Inventory Reporting

To support ongoing club development, promote transparency, and ensure the effective use of student resources, all ratified clubs are required to submit an Annual Club Reflection Form and Inventory Report at the end of each academic year.

2.3.2 Procedure: Submission Requirements

Annual Club Reflection Form (Due April 30th):

- Summary of events, initiatives, and meetings held throughout the year
- Attendance data and general membership trends
- A self-assessment of the club's success in meeting its mission or mandate
- Notable achievements, challenges, and lessons learned
- Planned goals or improvements for the upcoming year

Inventory Report Form (Due April 30th):

- List of all merchandise and prize items currently in the club's possession
- All club merchandise must be surrendered to the OTSU for holding over the summer
- Items will be returned at the beginning of the next school year
- Inventory must be submitted to the Financial Controller

Submission Notes:

- Forms must be submitted by the President or another executive member
- Should reflect input from the full executive team
- Must be shared with the incoming executive team for continuity

3. CLUB MEMBERSHIP, ELIGIBILITY, AND INVOLVEMENT

This section defines who can participate in clubs, outlines the standards for general and executive members, and sets expectations for student engagement and recognition.

3.1 MEMBERSHIP ELIGIBILITY AND RESTRICTIONS

3.1.1 Policy: Club Membership

- **Eligibility:** All enrolled Ontario Tech University students.
 - Executive membership is restricted to students who have paid all applicable fees.
- **Fees:** Clubs can make a formal request to the Clubs & Societies Department if they wish to introduce club membership fees..
- **Restrictions:** OTSU staff, officers, and faculty may not be Club members or executives.

3.1 Procedure: Membership Requests and Fees

- Clubs may formally request approval from the Clubs & Societies Department to implement a membership fee (optional, not automatic).
 - Approval of request will be granted on a case-by-case basis and must show direct value to the club initiative.
- Membership is otherwise free and open to all eligible students.

3.2 MEMBER ROLES AND RECOGNITION

3.2.1 Policy: General Member Definition and Responsibilities

A General Member:

- Is a non-executive student who voluntarily participates in club activities.
- Attends and engages in events, social, educational, and recreational opportunities.
- Does not hold decision-making authority.
- Is not eligible for Student Experience Record (SER) recognition unless they take on additional responsibilities beyond their role.

3.2.1 Procedure: General Member SER Recognition

- General members who contribute significantly beyond expected participation can submit an Involvement Form.
- This form must be:
 - Approved by the Club President
 - Submitted to the Member Engagement Coordinator by March 31st

3.2.2 Policy: Executive Member Eligibility and Structure

Every club must have a minimum of the following four executive positions:

- (i) President
- (ii) Vice President of Finance
- (iii) Vice President of Events
- (iv) Vice President of Communications

Clubs can designate additional internal titles (up to 15 total) for executives, ensuring the formal roles are filled.

Additional executive roles must directly relate to the club's initiative and are approved by the Clubs & Societies Department.

Executive members:

- Must be current Ontario Tech University students
- Must attend mandatory meetings and complete training presented by the OTSU to receive signing authority
- Failure to complete training may result in sanctions, including loss of ratification status
- Can list their executive role on their Student Experience Record
- Cannot change or update their role after March 31st of the fiscal year
- OTSU staff, officers, and faculty cannot be club executives or have signing authority

3.2.2 Procedure: Executive Training and Responsibilities

Executives must:

- Attend all mandatory meetings and training sessions
- Submit the required Print Media Approval Form before poster
- Adhere to the mandate on which their club was ratified
- Complete all training and pass the quiz to receive signing authority
- Remain in active communication with the Student Union

3.2.3 Procedure: Executive Role Descriptions and Expectations

President:

- Acts as club leader and Student Union liaison
- Oversees club operations and executive team
- Chairs meetings and ensures policy compliance
- Submits mandatory reports and involvement records

VP Finance:

- Manages budget and financial records
- Responsible for the tracking and reporting of club inventory and assets.
- Handles transactions, reimbursements, and funding requests
- Ensures financial transparency and accountability

VP Communications:

- Manages all internal and external messaging
- Promotes events and updates membership
- Oversees social media and branding

VP Events:

- Coordinates all event logistics and planning
- Submits event forms on time
- Collaborates with VP Finance and Communications for execution

Additional executive positions (up to 15 total) may be added with clear purpose and approval.

4. CLUB EXECUTIVE CONDUCT AND OPERATIONAL STANDARDS

This section outlines the conduct, responsibilities, and governance expectations of club executives. It includes mandatory training, communication standards, conflict resolution, documentation practices, and the role of constitutions.

4.1 EXECUTIVE CONDUCT EXPECTATIONS

4.1.1 Policy: Executive Leadership and Accountability

Club Executives are responsible for ensuring their club complies with all OTSU policies and procedures. This includes operational, financial, training, equipment booking and reporting obligations.

Key responsibilities include:

- Maintaining effective communication with members and the OTSU
- Completing mandatory training presented by the OTSU
- Attending meetings and the OTSU AGM
- Leading club operations in alignment with the ratified mandate
- Acting respectfully and professionally in all roles

4.1.1 Policy: Executive Conduct Standards

Executives must:

- Ensure compliance with OTSU policies and procedures
- Complete club training and maintain their roles in compliance with the training requirements
- Document all operational activity including:
 - Finances
 - Elections
 - Club transition documentation
 - Asset trackings
- Attend the OTSU Annual General Meeting (AGM) – Each club is required to send a minimum of 2 executive members to attend the AGM.
- Uphold club values and the approved mandate
- Submit accurate and timely executive role data (no changes allowed after March 31st)

Prohibited Activities:

Clubs and their Executives are strictly prohibited from:

- Conducting any commercial enterprise
- Offering goods or services for profit that are not consistent with the club's objectives
- Compensating executives or members, except for approved reimbursement of expenses
- Entering into legal agreements or signing official documents without authorization from OTSU
- Allowing club executives to win awards or prizes at events organized by their own club

4.2 EXECUTIVE ACCOUNTABILITY AND CONFLICT MANAGEMENT

4.2.1 Policy: Accountability and Conflict Resolution

Club executives do not have the authority to discipline or remove other executives. All concerns related to conduct, performance, or internal conflict must follow the formal review process. Society Executives do not have the authority to remove or discipline fellow executives unilaterally. Any concerns regarding executive performance, behavior, or internal conflict must follow the official Clubs & Societies conflict resolution process.

4.2.1 Procedure: Conflict Escalation Process

Step 1: Concerns or violations must be submitted in writing by email to the Clubs & Societies Department

Step 2: If unresolved, the matter may be escalated to the Clubs & Societies Committee using the Sanctions Form

Step 3: A case-by-case review will be conducted. If a violation is confirmed, appropriate sanctions may follow as per the Sanctioning Procedure

4.3 COMMUNICATION AND COLLABORATION STANDARDS

4.3.1 Policy: Communication Standards

Club executives must maintain open, timely, and respectful communication:

- With club members
- With the Clubs & Societies Department

- Through approved digital platforms

Each Club must utilize a minimum of two (2) active communication platforms:

- A designated Club email address
- A public-facing social media platform

All digital communication should align with OTSU values and be free from discrimination, harassment, or misinformation.

4.3.1 Procedure: Digital Communication Requirements

Executives must:

- Executives must regularly monitor and respond to student and OTSU inquiries.
- All club correspondence should be professional and consistent with OTSU policies.
- Clubs must maintain an active online presence, including their OTSU club profile.

4.3.2 Procedure: Post-Ratification Digital Submission

- Clubs have 10 business days after ratification to complete and submit the Post-Ratification Digital Information Form.
- Executives are responsible for keeping digital content current and relevant.

4.4 COLLABORATION WITH OTHER CLUBS OR SOCIETIES

4.4.1 Policy: Fair Play and Inter-Club Collaboration

Purpose:

To foster a respectful, collaborative, and resource-efficient student community, the Ontario Tech Student Union (OTSU) encourages all registered clubs to operate with integrity, mutual respect, and a shared commitment to building a vibrant campus culture. This policy aims to reduce unnecessary duplication, promote meaningful partnerships, and ensure fair recognition of creative and organizational contributions.

1. Respect for Each Other's Work

- Clubs must honour the intellectual and creative contributions of others.
- Reusing or replicating another group's ideas, initiatives, or events without proper credit or collaboration is discouraged.
- Clubs are encouraged to communicate openly and seek collaboration when building on existing concepts.

2. Duplicate or Similar Clubs

- OTSU may review or limit registration of new clubs with significantly overlapping mandates.
- In cases of similarity, OTSU may facilitate dialogue, suggest a merger, or require clarity on unique contributions of each club.

3. Handling Conflict and Disputes

- The OTSU does not intervene in internal or interpersonal conflicts unless they involve harassment, discrimination, or violations of student conduct or equity policies.
- Clubs are expected to resolve disagreements respectfully and professionally.

4. Independent, Not Isolated

- Clubs are expected to operate independently, but are encouraged to seek guidance and support from the OTSU or the VP Student Life when needed, including for conflict prevention, collaborative initiatives, and governance issues.

5. Community over Competition

- OTSU strongly promotes inter-club partnerships to maximize student engagement and minimize duplication of efforts.
- Clubs that consistently disregard community-building practices may be subject to review.

4.4.1 Procedure: Inter-Club Communications

1. New Club Applications

- All applicants proposing a new club must review the current list of ratified clubs to avoid duplication.
- If a proposed club's mandate significantly overlaps with an existing club, the applicant may be:
 - Encouraged to merge with the existing club; or
 - Required to clearly demonstrate the unique purpose and activities not already addressed by current clubs.
- The Clubs & Societies Committee reserves the right to deny applications for clubs deemed redundant.

2. Collaboration Expectations

- Existing clubs may be encouraged or required to collaborate with others—particularly for events with similar goals, target audiences, or themes.
- Co-hosting events, joint campaigns, shared advocacy, and cross-promotion of initiatives are all encouraged forms of collaboration.

3. Event Approvals

- When clubs submit similar or overlapping event proposals, OTSU may recommend a joint event or cross-promotion to maximize participation and resources.
- Approval may be contingent on demonstrated efforts to collaborate when appropriate.

3. Support Resources

- Clubs may request support from OTSU or the VP Student Life in areas such as conflict resolution, partnership building, event coordination, and constitutional guidance..

4.5 CLUB CONSTITUTIONS AND DOCUMENTATION

4.5.1 Policy: Club Constitutions

Clubs may submit a Constitution as part of their Ratification Package.

- A Constitution defines roles, responsibilities, and governance procedures within the club.
- Constitutions are not valid if they conflict with OTSU policies, procedures, or bylaws.

4.5.1 Procedure: Constitution Submission and Use

An up-to-date Constitution (if created) must:

- Be included in the Ratification Package
- Be accessible by the Clubs & Societies Department
- Be posted on the OTSU website (if required)

Please note that Societies (faculty-based clubs) must include a constitution.

5. CLUB EVENTS AND RISK MANAGEMENT

This section establishes the standards and approval process for club events, including required documentation, timelines, classification levels, risk assessment, and how to engage with external guests or organizations.

5.1 GENERAL EVENT REQUIREMENTS

To ensure active engagement and contribution to campus life by requiring clubs to meet a standard for all ratified clubs. These requirements ensure that clubs remain visible, active and align with the values of student involvement.

5.1.1 Policy: Minimum Involvement Requirements

- All ratified Clubs must hold a minimum of two (2) events per semester
- Four (4) events per academic year, including:
 - One (1) that benefits the student body as a whole, such as advocacy or volunteering
- Events must:
 - Align with the club's mandate
 - Be open, inclusive, and accessible to the general student body
 - Not included: internal-only meetings as eligible events
- Clubs must demonstrate ongoing engagement on campus and online

5.1.1 Procedure: Event Compliance and Monitoring

- A semesterly review will assess each club's compliance.
- Clubs at risk of not meeting requirements will receive early warnings.
- Clubs inactive during the Fall semester may lose base funding for Winter unless they:
 - Submit an appeal explaining inactivity
 - Have that appeal approved by the Clubs & Societies Committee
- Appeals must be submitted within 10 business days of funding removal notice.

5.2 EVENT APPROVAL AND CLASSIFICATION

5.2.1 Policy: Event Approval Requirements

Clubs must submit a detailed Event Form and receive approval before hosting any event. Hosting events without receiving approval or following the correct procedure will result in sanctions.

5.2.1 Procedure: Event Submission and Risk Classification

Events must be submitted using the designated online Event Forms, including all required information within the allocated approval timelines.

Approval and confirmation will be provided to the club via email communication.

There are **three event levels** based on risk and complexity:

Level 1 Events – Minimal Risk

Applicable to:

Recognized clubs hosting on-campus, small-scale internal events for Ontario Tech University students.

Definition:

Level 1 events are *minimal risk* and may be approved internally by OTSU staff. They are small-scale, on-campus activities organized by recognized clubs, limited to Ontario Tech University students with fewer than 100 participants expected. No external guests may participate.

Submission Timeline:

- All documentation must be submitted to OTSU at least 5 business days prior to the scheduled event date.

Permitted Activities Include:

- General society meetings
- Social events
- Study sessions, arts & crafts, movie showings, game nights
- Bake sales or food-related fundraisers intended for internal club use only (not benefiting external charities)
- Events may involve the sale or distribution of food or refreshments only (No non-food items may be sold)

Additional Requirements:

- All food sales must comply with the OTU Bake Sale Guidelines
- All funds must be collected using the OTSU Square platform

Level 1 Events Permitted:

- Meetings: General club or executive meetings
- Social Mixers: Coffee chats, hangouts, celebrations
- Interactive Activities: Game night, karaoke night, movie night
- Creative & DIY: Craft night, bracelet making
- Intellectual: book club, skill share, academia-related, debates & discussions

Level 2 Events – Moderate Risk

Applicable to:

Recognized clubs hosting large-scale, on-campus events for Ontario Tech University students..

Definition:

Level 2 events are moderate risk and require formal approval from both OTSU and Ontario Tech University's Risk Management Department.

These events are defined by the following characteristics:

- Hosted on-campus only
- Attendance strictly limited to current Ontario Tech University students
- Expected attendance is greater than 100 and not exceeding 200 students

- Organized by a recognized club
- External guests may only participate as speakers, judges, or performers, with prior approval and documentation. General external attendees or spectators are not permitted.

Submission Timeline:

- All documentation must be submitted to OTSU at least 20 business days prior to the scheduled event date. This timeline includes:
- 10 business days for internal OTSU review, including risk assessment and preparation of documentation for university review.
- 10 business days for the Ontario Tech University Risk Management Department to review and respond to the submitted details.
- Late submissions may result in delays or event cancellation.

Required Documentation Checklist:

General Event Requirements (Applicable to All Level 2 Events)

REQUIREMENT	DESCRIPTION
Event Submission Form	Fully completed form outlining event details
Emergency Management Plan	Plan addressing risks, emergency contacts, and response procedures
Square Sales Information	List of items or tickets sold via the OTSU Square platform (if applicable)
Charitable Donation Info	Charity name and registration number for fundraising events
Merchandise List	Inventory of items to be sold or distributed in line with OTSU Merchandise Guidelines

External Guest Requirements (if applicable):

REQUIREMENT	DESCRIPTION
External Guest Profile	Bio, resume, or LinkedIn profile for all non-student speakers, judges, or performers
Certificate of Insurance (COI)	Proof of at least \$2 million liability insurance
Speaker or Vendor Contract	Signed contracts for all guest speakers and service providers
Indemnification Form	Signed OTSU form for all external guests

Permitted Activities:

The following activities are permitted under Level 2, provided all documentation and approvals are secured.

ACTIVITY	CONDITIONS
Guest Speakers	Permitted with prior approval and documentation
Sale or Distribution of Merchandise	Permitted in line with OTSU Guidelines
Religious or Cultural Celebrations	Permitted for students only
Educational Competitions	Permitted; external judges require approval
Charitable Fundraisers	Must benefit a registered Canadian charity
Social Gatherings	On-campus only; max 200 attendees
Food Sales	Permitted per OTU Bake Sale Guidelines

Prohibited Activities:

- Off-campus events

- Attendance by external guests not serving a formal function
- Events exceeding 200 attendees
- Activities violating OTSU or university policies

Level 3 Events – Significant Risk

Applicable to:

Recognized clubs hosting large-scale, high-impact events either on-campus or off-campus involving external guests or attendance exceeding 200 individuals..

(A) On-Campus Events

Definition:

Level 3 on-campus events are considered significant risk and require formal approval from OTSU, Ontario Tech University's Risk Management Department, and coordination with relevant university departments (Facilities, Security, Health & Safety).

Characteristics:

- Hosted on Ontario Tech University property
- Attendance exceeds 200 individuals
- May involve multiple external guest speakers, judges or performers
- Organized by a recognized club
- Requires collaboration with university services and adherence to institutional protocols

Submission Timeline:

Event proposals must be submitted to OTSU at least 45 business days prior to the scheduled event date:

- 10 business days for OTSU internal review and risk assessment
- 35 business days for coordination with Risk Management and campus service departments
- Late submissions will not be accepted

Required Documentation Checklist:

(See table in previous section - all requirements remain the same as for on-campus Level 3 events, plus the following additions):

REQUIREMENT	DESCRIPTION
Event Submission Form	Fully completed form outlining event details
Emergency Management Plan	Plan addressing risks, emergency contacts, and response procedures
Security Plan	A security and crowd control plan coordinated with Campus Safety
Square Sales Information	List of items or tickets sold via the OTSU Square platform (if applicable)
Charitable Donation Info	Charity name and registration number for fundraising events
Merchandise List	Inventory of items to be sold or distributed in line with OTSU Merchandise Guidelines

External Guest Requirements:

Required for each speaker, judge, or performer.

REQUIREMENT	DESCRIPTION
External Guest Profile	Bio, resume, or LinkedIn profile for all non-student speakers, judges, or performers
Certificate of Insurance (COI)	Proof of at least \$2 million liability insurance

Speaker or Vendor Contract	Signed contracts for all guest speakers and service providers
Indemnification Form	Completed and signed OTSU form for all external guests

Permitted Activities:

The following activities are permitted under Level 3 with prior approval and full documentation.

ACTIVITY	CONDITIONS
Multi-Speaker Panels	With full documentation and coordination
High-Attendance Celebrations	With approved safety plans
Cultural Festivals	With controlled logistics
Fundraising Galas	Must benefit a registered Canadian charity
Performances or Competitions	With contracts and COIs for participants

(B) Off-Campus Events

Definition Level 3 off-campus events are high-risk and require approval from OTSU. These events involve venues not operated by Ontario Tech University and require coordination to ensure proper insurance, safety, and compliance with third-party requirements.

Characteristics:

- Hosted off-campus at a non-university venue
- Organized by a recognized club
- Attendance may exceed 200 individuals
- May involve third-party vendors (e.g., DJs, catering)

Submission Timeline:

- Event documentation must be submitted to OTSU at least 45 business days in advance. This allows for:
 - 10 business days for internal OTSU risk assessment and documentation review
 - 35 business days for venue coordination and planning, including insurance and security logistics
- Late submissions will not be accepted

Required Documentation:

REQUIREMENT	DESCRIPTION
Event Submission Form	Includes full event details, venue, and itinerary
Venue Contract	Signed third-party venue agreement
Certificate of Insurance (COI)	Proof of \$5 million insurance naming OTSU and Ontario Tech as additional insured
Indemnification Forms	Required for all vendors (DJs, caterers, etc.)
Security Plan	Created in collaboration with OTSU to address entry control, crowd management and emergency response plan
Square Sales Information	All sales processed through OTSU Square

Permitted Activities:

ACTIVITY	CONDITIONS
Banquets or Galas	Permitted with venue compliance and full documentation (insurance & contracts)
Off-Campus Socials	Permitted with verified vendor insurance and security plan
Fundraisers	Permitted if linked to a registered Canadian charity and compliant with local bylaws
Performances or Shows	Permitted with external vendor indemnification and security planning

Prohibited Activities:

- The following are not permitted under Level 3 event classification:
 - Events without a venue contract or appropriate insurance
 - External vendors participating without signed indemnification forms
 - Events in venues that do not meet safety or accessibility standards
- Events that do not comply with crowd capacity or safety guidelines
- Participation by external guests without approved documentation
- Activities that violate OTSU or university policies

5.2.2 Procedure: Event Audience Limitations

Clubs may only host on-campus events for the internal university community. This includes current Ontario Tech University and Durham College students and staff, as well as a limited number of approved external guests such as speakers, judges, or performers.

At this time, student clubs are not permitted to host on-campus events that are open to the general public or that involve external attendees outside of formal speaking or performance roles.

If a club is interested in planning an event for a broader external audience (e.g., community-wide, alumni, or public-facing initiatives), they must contact Ontario Tech University's Conference Services team. Conference Services handles bookings for public events and can provide guidance on appropriate procedures, insurance requirements, and space reservations.

5.2.3 Procedure: Insurance and Liability

- All external vendors must submit a Certificate of Insurance (COI) with at least \$5 million in liability
- Events serving alcohol or occurring off-campus must carry third-party insurance of at least \$5 million

5.3 RISK ASSESSMENT AND MANAGEMENT

5.3.1 Policy: Event Risk and Safety Standards

The OTSU reserves the right to deny or cancel events based on submitted details, risk, safety, or insurance issues.

5.3.1 Procedure: Risk Assessment Review

- The Clubs & Societies Department and the Universities Risk Department will evaluate risk based on the Event Form
- Clubs may be asked to revise plans to meet safety or liability standards
- Failure to meet deadlines, submit forms, or respond to revisions may result in event denial

5.4 EXTERNAL GUESTS AND ORGANIZATIONS

5.4.1 Policy: External Guest Engagement

Clubs may invite external organizations or speakers, provided the event aligns with university values, follows approval protocols and our external guest policy.

5.4.1 Procedure: External Guest Application Process

To host external guests:

- The society must submit an Event Form and an External Guest Indemnification Form at least
 - Level 2 - 20 business days in advance
 - Level 3 - 45 business days in advance
- Include speaker/guest name, background, purpose, event format, and any promotional materials

Review criteria include:

- Educational mission alignment
- Safety, accessibility, and crowd management
- Compliance with university and OTSU policies
- Space availability

5.4.2 Procedure: Event Responsibilities for External Engagements

Clubs must:

- Ensure respectful behavior by attendees
- Report attendance figures and changes
- Notify OTSU of any changes to the guest, event, or format
- State clearly that guest views do not represent the university or OTSU

5.4.3 Procedure: OTSU External Guest Policy

Purpose:

This policy establishes clear guidelines for the invitation and hosting of external guests by OTSU ratified Clubs on university property. It aims to support academic freedom, foster inclusive dialogue, and ensure that all events align with the Ontario Tech Student Union's (OTSU) commitment to educational enrichment, respectful engagement, and student safety.

Scope and Authority:

This policy applies to all OTSU-affiliated clubs hosting events involving an External Organization or User in any university-owned, leased, or operated space.

It applies to Level 2 and 3 Events only – those involving external guests and presenting moderate to elevated risk.

Level 1 events, which involve only University Members and present low risk and are excluded from this policy.

Guiding Principles:

The OTSU affirms its commitment to:

- Viewpoint neutrality in reviewing speaker and guest invitations.
- Promoting diversity of opinion, cultural expression, and religious/philosophical pluralism.
- Upholding campus safety and compliance with laws and university regulations.
- Encouraging the open exchange of ideas that enrich student learning and community dialogue.

Policy:

1. Approval Requirements

- All External Guests must be sponsored by a ratified OTSU Club.
- The correct Event Form must be submitted within the allocated timeline prior to the proposed event.
- A completed External Guest Indemnification Form must accompany the submission and include:
 - Guest's name and background
 - Event purpose and format
 - Promotional materials or planned marketing content
 - Insurance requirements must be met

2. Review Criteria

The Clubs & Societies Department will evaluate the submission based on:

- Alignment with the university's educational mission and student development goals
- Space and resource availability
- Safety, accessibility, and crowd control planning
- Compliance with OTSU and University policies, as well as applicable laws.

Note: Guest viewpoints will not be grounds for approval or denial unless they contravene university policies, incite violence, or violate hate speech laws.

3. Denial and Appeals

- If denied, the Applicant will receive a written explanation.
- The Applicant may appeal within 5 business days with evidence of changes addressing the rationale for denial.
- Appeals will be reviewed by the Clubs & Societies Department, whose decision is final.

4. Funding and Resource Use

- OTSU funds earmarked for educational purposes may be used for events featuring External Guests only when:
 - The event has clearly defined learning objectives.
 - Attendance is open to the wider student body.

5. Event Responsibilities

The Ratified Club hosting an External Guest is responsible for:

- Maintaining respectful conduct among attendees
- Informing OTSU of:
 - Any material change in guest participation or event format
 - Updated attendance numbers
- Clearly stating (verbally or in promotional materials) that the views expressed by the guest do not represent OTSU or Ontario Tech University

5.4.4 Procedure: External Guest

Step 1: Submit Request

- Complete and submit the Event Form and External Guest Indemnification Form via the Clubs and Societies portal within the allocated timeline before the event.

Step 2: Await Review

- The Clubs & Societies Department and University Risk Management Department will review submissions based on the outlined criteria and may request clarification or modifications.

Step 3: Receive Approval or Denial

- Approved events may proceed with OTSU oversight.
- Denied events will receive rationale and an option to appeal within five (5) business days.

Step 4: Host Responsibly

- Clubs must execute the event in accordance with the approved plans.
- Communicate any changes to the OTSU immediately.
- Monitor and manage guest and attendee behavior to ensure a safe and respectful event.

Campus Values and Expression Statement:

“The OTSU supports a campus environment where diverse ideas, including religious and philosophical beliefs, can be expressed, explored, and debated with civility and respect. This policy exists to protect, not restrict, the open exchange of viewpoints and to enrich the knowledge of our student community.”

5.4.5 Policy: Guest Speaker Insurance Policy and Guidelines

Purpose:

This policy establishes insurance requirements for external guest speakers invited by student clubs. It is designed to manage institutional risk, ensure safe and respectful events, and align with the university’s policies on space use and reputational responsibility.

Applicability:

This policy applies to all individuals invited to speak at events hosted by OTSU-ratified clubs who are not current Ontario Tech University students, staff, or faculty members.

When Insurance may be required:

A Certificate of Insurance (COI) may be required from a guest speaker or their affiliated organization if any of the following apply:

- The speaker is affiliated with an external organization (e.g., business, nonprofit, religious, cultural, or political group)
- The speaker is addressing sensitive, high-profile, or potentially divisive topics, including but not limited to:
 - Political ideologies or conflicts (domestic or international)
 - Social justice movements or activism
 - Global affairs or humanitarian issues
 - Topics that may create tension within the campus community or attract public/media attention
- The speaker will lead interactive elements such as performances, ceremonies, workshops, or demonstrations.
- The event is expected to draw more than 50 attendees.

- The speaker is being compensated or is promoting a product, service, organization, or cause.

Clubs are expected to assess their event's risk level and consult with OTSU or Risk Management when uncertain. Final determination on insurance requirements rests with OTSU and/or Risk Management Services.

Insurance Documentation Requirements:

When required, the guest speaker (or their organization) must provide a Certificate of Insurance (COI) that:

- Specifies a minimum of \$2 million CAD in general liability coverage.
- Lists Ontario Tech University and the Ontario Tech Student Union (OTSU) as additional insured parties.
- Covers the entire duration of the event, including setup and takedown, if applicable.

Exemptions:

Exemptions from the insurance requirement may be granted on a case-by-case basis for:

- Small-scale, low-risk events (typically under 50 attendees).
- Educational or career-related speakers not promoting a business, political, or advocacy organization.
- Events without interactive elements or content requiring heightened review.
- Volunteer speakers who are not receiving compensation and are not affiliated with an external organization.

To request an exemption, organizers must submit the relevant information through the event planning form no later than 20 business days before the event.

Submission Deadlines and Compliance:

- All event and speaker details must be submitted at least 20 business days in advance of the proposed event.
- If insurance is required, the Certificate of Insurance must also be submitted by that deadline.
- Late or incomplete submissions may result in event denial or cancellation.

5.4.6 Procedure: Guest Speaker Classification and Insurance Compliance

Purpose:

This procedure outlines the steps for determining when guest speaker insurance is required and ensures student organizations understand the documentation and timelines needed for event approval.

1. Classify the Guest Speaker

Use the following categories to evaluate the speaker's affiliation and the potential risks associated with the event:

A. Educational and Professional Speakers:

Includes speakers whose focus is academic, career-related, or informational.

Examples:

- Grad/professional school recruiters
- Test prep organizations (MCAT, LSAT, etc.)
- Nonprofit or research organizations focused on education or public service

Insurance is typically not required, unless:

- The speaker is conducting a high-risk or interactive activity
- The speaker is affiliated with a business or receiving compensation The event has over 50 attendees

B. Cultural, Religious, Lifestyle, or Political Speakers:

Includes speakers representing belief systems, identities, ideologies, or advocacy efforts. Examples:

- Religious/spiritual leaders
- Cultural performers or heritage educators
- Wellness, identity-based, or motivational speakers
- Political representatives, commentators, or social justice advocates

These speakers may require insurance depending on:

- Affiliation with an external organization
- Nature of content (e.g., political, sensitive, controversial)
- Size and structure of the event
- Potential for reputational impact or public attention

All events must be hosted by a ratified club and must be open to all students.

2. Evaluate the Insurance Requirement

Insurance is likely required if any of the following apply:

- The speaker is not affiliated with Ontario Tech University.
- The event includes political, cultural, religious, or high-visibility topics.
- The speaker is expected to draw more than 50 attendees.
- The speaker is conducting interactive or demonstrative elements.
- The speaker is being paid or promoting a product/service.
- The speaker represents an external organization, including businesses, nonprofits, or religious/political institutions.

If uncertain, consult with OTSU Campus Life or Risk Management Services.

3. Insurance Documentation

If insurance is required, the Certificate of Insurance must:

- Provide a minimum of \$2 million CAD in general liability
- Name Ontario Tech University and OTSU as additional insured
- Cover the full duration of the event, including setup/takedown

4. Requesting an Exemption

Clubs may request an exemption by submitting a formal request through the event planning form at least 20 business days before the event.

Required details:

- Speaker name and affiliation
- Event topic and purpose
- Estimated attendance
- Reason for exemption

Requests will be reviewed by OTSU and/or Risk Management Services on a case-by-case basis.

5. Compliance and Timelines

- All event submissions must be received 20 business days in advance of the proposed date.

- If insurance is required, the COI must also be submitted by this deadline.
- Events with missing, late, or incomplete documentation may be denied or cancelled.

6. CLUB PROMOTION, SOCIAL MEDIA, AND DIGITAL STANDARDS

This section outlines the policies and procedures surrounding the public communication, promotion, and online presence of OTSU-ratified clubs. It includes guidelines for digital accountability, content approval, and appropriate use of platforms.

6.1 DIGITAL PRESENCE AND COMMUNICATION CHANNELS

6.1.1 Policy: Digital Communication Requirements

All ratified Clubs are required to:

- Maintain a public-facing digital presence
- Be accessible and responsive to Ontario Tech University students and the OTSU
- Use a minimum of two communication channels:
 - One must be an official email account
 - The second may be any approved social media platform

6.1.1 Procedure: Communication Commitment

- Club executives must actively monitor and respond to inquiries via their digital platforms.
- Communication must be professional, respectful, and aligned with OTSU values.
- Clubs failing to respond or maintain communication may face review or sanction.

6.1.2 Procedure: Post-Ratification Digital Submission

- Within 10 business days of ratification approval, Clubs must complete and submit the Post-Ratification Digital Information Form to the Member Engagement Coordinator.
- This form confirms:
 - Club email
 - Official social media handles
 - Updated profile for the OTSU website
- Executives are responsible for ensuring all online club information remains current and accurate.

6.2 EVENT PROMOTION AND PRINT MEDIA

6.2.1 Policy: Print Media Guidelines

To maintain respectful and inclusive campus advertising, all physical promotional materials must adhere to the university's and OTSU's standards.

6.2.1 Procedure: Poster Approval Requirements

- All posters must be submitted via the Print Media Approval Form before being posted on campus.
- Clubs must follow the Ontario Tech University Postering Policy.
- Clubs may not post promotional materials in Durham College spaces.
- Posters with graphic, vulgar, or potentially triggering content may be denied approval.

6.3 SOCIAL MEDIA USE AND ACCOUNTABILITY

6.3.1 Policy: Social Media Standards

Clubs must maintain public and accountable social media platforms to:

- Foster transparency
- Promote inclusivity
- Ensure positive student engagement

Social media content must reflect the values of Ontario Tech University and the OTSU.

6.3.1 Procedure: Appropriate Social Media Use

Clubs are encouraged to use social media to foster positive engagement, share information, and promote events that align with their objectives and the values of the university community.

Clubs are prohibited from using their social media platforms to:

- Harass or Defame: Engaging in behavior that could be considered discriminatory, bullying, or harassing, including making offensive or derogatory comments related to sex, gender, race, nationality, disability, sexual orientation, religion, or age. This aligns with the university's Harassment Policy and the Ontario Human Rights Code.
- Disparage the University or OTSU: Posting content that brings discredit to the University or the Ontario Tech Student Union by insulting fellow students or other individuals, or making defamatory or offensive comments about individuals or groups.
- Attack Students: Posting content that targets individual students with the intent to harm their reputation or well-being.

6.3.2 Procedure: Access and Platform Transparency

- Social media accounts must be accessible to the general student community.
- Account access should not be restricted except for valid safety or spam-related reasons.
- Only Clubs in good standing with official ratification may associate their name and media accounts with the OTSU.
- The OTSU Clubs & Societies Department reserves the right to edit, update, or remove content from any club's online profile affiliated with the Ontario Tech Student Union.
 - This includes profiles hosted on the OTSU website, Student Life Portal, or any other official platform.
 - Edits may be made to ensure accuracy, consistency, professionalism, adherence to OTSU branding guidelines, and compliance with student union policies.

These guidelines are in accordance with the university's Student Code of Non-Academic Conduct, the Ontario Human Rights Code, and the Respectful Workplace Policy, all of which prohibit discriminatory or harassing behavior and the publication of defamatory content.

7. CLUB FUNDING, SPONSORSHIP, AND FINANCIAL PROCEDURES

This section sets forth the policies and procedures related to the responsible management of club funding, including base funding allocations, year-end expenditures, subscription requests, sponsorship guidelines, and financial accountability. For detailed procedural requirements, refer to the Clubs Financial Procedure document.

7.1 BASE FUNDING OVERVIEW AND USE

Base Funding is provided by the OTSU to support the foundational activities and initial operational needs of ratified clubs. This funding is intended to promote equitable access to resources and assist clubs in launching or maintaining core functions during the academic year.

7.1.1 Policy: Base Funding and Restrictions

Funding Use and Timeline:

- Base Funding is allocated annually and must be used within the current fiscal year.
- Unused Base Funding does not carry over to the next fiscal year under any circumstances.
- Base Funding is intended primarily for start-up and foundational club activities, such as promotional materials, recruitment efforts, and basic administrative supplies.

Funding Restrictions:

The following restrictions apply to the use of Base Funding.

Base Funding may not be used for:

- Donations or charitable contributions
- Appreciation dinners, banquets, galas etc.
- Alcohol, cannabis, or related products
- Personal travel expenses or accommodations
- Gift cards, cash equivalents, or gratuities
- Salaries or wages for members of the Club
- Clothing/apparel for executive members.
- Any expense deemed unrelated to club purpose or not in alignment with OTSU values

Note: The approval and usage of Base Funding is subject to the discretion of the OTSU, which reserves the right to reject any funding request that does not align with policy, budget availability, or ethical standards.

7.2 REIMBURSEMENT OF CLUB FUNDS

Clubs affiliated with the OTSU are eligible to receive reimbursement for approved and pre-authorized club-related purchases. This policy outlines the requirements and process for submitting reimbursement claims to ensure financial transparency and timely processing.

7.2.1 Policy: Reimbursement Submissions

Submission Timeline:

- All reimbursement requests must be submitted within 30 business days from the original date of purchase.
- Requests submitted after the 30-day window will not be processed unless prior written approval has been granted by the Financial Controller.

Late Submission Exceptions:

Exceptions may be considered only under the following documented circumstances:

- Verified technical issues (e.g., system errors, email server failures)
- Receipt-related delays (e.g., vendor or transaction processing delays), supported by a clear record of communication

Note: Misplaced receipts or forgetting to submit the request does not qualify as a valid reason for a late submission.

7.2.1 Procedure: Reimbursement Submission Process

To receive reimbursement, the following steps must be followed:

1. Completion of Reimbursement Form

- The individual who made the purchase must complete the correct OTSU Reimbursement Form in full.

2. Receipt Submission

- Original, itemized receipts must be attached to the reimbursement form. Screenshots or bank statements are not accepted in place of receipts.
- The receipt must include an HST number, if taxes are charged

3. Authorization Signatures

The form must be signed by:

- The individual requesting reimbursement.
- Two authorized society signing officers (cannot be the student requesting the reimbursement).
- These signatures confirm the purchase was pre-approved and society-related.

4. Submission to OTSU

- The fully completed and signed form, along with all required documentation, must be submitted to the OTSU for financial processing.

5. Incomplete Submissions

- Forms that are incomplete, unsigned, or missing valid receipts will be returned and may delay or disqualify reimbursement.

7.2.2 Policy: Equitable Use of Base Funding

Base funding is provided to all ratified clubs by the OTSU to support inclusive, mission-aligned programming.

- Base funding must be used only for activities that:
 - Are approved through the Event Form process
 - Benefit the entire membership or broader student community
 - Align with the club's ratified goals

7.2.2 Procedure: Equitable Use of Base Funding

Acceptable Use:

- Supplies or services that benefit the whole club
- Inclusive programming costs
- Approved subscriptions aligned with the club's mission

Prohibited Use:

- Personal purchases or exclusive executive perks
- Private or executive-only events
- Any expense without a clear, documented benefit to the general membership

7.3 END-OF-YEAR SPENDING ACCOUNTABILITY

7.3.1 Policy: Responsible Year-End Spending

To prevent misuse of funds at the end of the academic year:

- Clubs must demonstrate consistent engagement throughout the year
- Reimbursement requests made during the final month of the funding period may be denied if the club was inactive

7.3.1 Procedure: End-of-Year Review and Funding Suspension

OTSU will assess spending against:

- Event records
- Member engagement
- Club activity level

If found non-compliant, clubs may:

- Be asked to justify final expenses
- Have final reimbursements denied
- Face ineligibility for future funding or ratification To use funding for subscriptions, Societies must:

7.4 SUBSCRIPTION FUNDING GUIDELINES

7.4.1 Policy: Subscriptions and Digital Tools

Clubs may only use funding for online subscriptions that:

- Support the club's mission or programming
- Provide value to the entire club membership

7.4.1 Procedure: Subscription Request Process

To use funding for subscriptions, clubs must:

- Submit a Request for Payment Form including:
 - Name and purpose of the subscription
 - How it benefits the full membership
- Register the subscription under the official club email
- Avoid using personal accounts for club-related subscriptions

Requests are subject to approval by the OTSU before any payment or reimbursement.

7.5 FINANCIAL RESPONSIBILITIES OF EXECUTIVES

7.5.1 Policy: Executive Oversight of Club Finances

Club executives, particularly the VP Finance, are responsible for:

- Maintaining accurate financial records
- Ensuring spending aligns with the approved budget
- Complying with all OTSU financial procedures
- Being transparent about financial decisions with club members

7.5.1 Procedure: Managing Club Budgets

Submit receipts and documentation for all purchases

- Use only the allocated budget for approved events or initiatives
- Track spending regularly using ledgers provided by the Finance Generalist
- Coordinate with the VP Events and President for budget alignment

Failure to follow financial procedures may result in:

- Loss of funding
- Suspension of financial privileges
- Denial of future ratification

7.6 CLUB SPONSORSHIP

7.6.1 Policy: Sponsorship Agreements

Clubs may seek external sponsorship but must do so transparently and with OTSU oversight. Approval from the Clubs & Societies Department is required for accepting sponsorship donations

7.6.1 Procedure: Securing Sponsorship

To accept a sponsorship:

- Complete the Clubs & Societies Sponsorship Agreement Template (available on the OTSU website)
- Submit the agreement for review and approval
- Only OTSU signing authorities may sign sponsorship agreements – not club executives

8. EXTERNAL AFFILIATIONS, INVOLVEMENT RECORDS, AND SANCTIONS

This section outlines how clubs interact with external organizations, how student contributions are formally recognized through the Student Experience Record (SER), and what consequences apply if clubs violate OTSU policies.

8.1 EXTERNAL AFFILIATIONS

8.1.1 Policy: Disclosure of External Relationships

All clubs must disclose any affiliations or partnerships with external organizations to ensure transparency, compliance, and alignment with OTSU values.

- Affiliations must be reported to the Clubs & Societies Department
- The OTSU reserves the right to approve or restrict these affiliations
- Any external group engagement must comply with applicable OTSU and university policies

8.1.1 Procedure: External Affiliation Review

- Affiliations must be reported to the Clubs & Societies Department
- The OTSU reserves the right to approve or restrict these affiliations
- Any external group engagement must comply with applicable OTSU and university policies

8.2 INVOLVEMENT RECORDS (STUDENT EXPERIENCE RECORD - SER)

8.2.1 Policy: Executive and Member Eligibility for SER Recognition

Clubs must submit active membership lists by March 31st to the OTSU for recognition.

Executive Members:

- Must complete all mandatory training
- Submit executive roles and responsibilities in the Ratification Package
- Any changes must be submitted by March 31st to be reflected on the SER
- Eligibility requirements include training completion and fulfillment of executive role responsibilities

General Members:

- Are not automatically eligible for SER recognition
- May request recognition if they:
 - Take on responsibilities beyond standard involvement Complete and submit an Involvement Form (signed by the Society President)

8.2.1 Procedure: SER Submission and Deadlines

Executive Lists:

- Must be submitted by March 31st of each academic year

General Member Involvement Requests:

Students who have exceeded the definition of a general society member may submit a request for recognition.

- Request form must include:
 - Event or project details
 - Description of their additional responsibilities
 - Number of hours contributed
- Must be signed by the Society President
- Submitted to the Member Engagement Coordinator by March 31st

Updates to Executive Titles and Responsibilities:

- Must be finalized and submitted by March 31st to be reflected in the SER

8.3 CLUB SANCTIONS AND REMOVAL OF MEMBERS

8.3.1 Policy: Violations and Consequences

Clubs and/or executives may face sanctions for:

- Violating OTSU or university policies
- Violating the Ontario Tech University Student Code of Conduct
- Engaging in actions that harm the club or the OTSU's reputation Members (including executives) may also be removed from a club, but only by following proper procedures.

8.3.1 Procedure: Sanctions Process

- Sanctions are determined by the Clubs & Societies Department and Clubs & Societies Committee
- Review the official Clubs & Societies Sanction Procedure for detailed criteria and examples
- The process may include:
 - Investigation of violations
 - Written warnings
 - Loss of funding or privileges
 - Suspension or removal of executives
 - Revocation of society ratification

8.3.2 Procedure: Removal of Members

- Members may be removed from a club or executive position only by following the steps outlined in the Sanctioning Procedure
- Removal must be:
 - Documented
 - Approved by the appropriate authority (usually the Clubs & Societies Committee)
 - Based on evidence of misconduct, negligence, or serious failure to perform

9. RELATED POLICIES, PROCEDURES AND DIRECTIVES

- Ontario Tech Student Union General Bylaws
- Ontario Tech Student Union Clubs Financial Procedure
- Ontario Tech Student Union Clubs & Societies Sanction Procedure