# 

**Society Executive Handover Pack**

**2024-2025**

**Deadline for Submission: Week 3 Term 3 (Wednesday 8th May)**

*(All forms should be saved as a word document and submitted electronically as a single document to* [studentactivities@warwicksu.com](mailto:studentactivities@Warwicksu.com)*)*

**COMFIRMATION SHEET**

Please mark each of the sections in the below table as COMPLETE

|  |  |
| --- | --- |
| **Document** | **Incoming President** |
| Exec Sheet |  |
| Proof of Election Society Fairs application |  |
| Memorandum of Understanding |  |
| Society Constitution |  |
| Inventory |  |
| Annual Risk Assessment |  |
| Grant application |  |
| Exec Quizzes and Risk assessment training |  |
| Event Deadlines |  |

Please sign off and date the declaration below to confirm that you are submitting this documentation on behalf of your Society:

**Incoming President**

Society Name:

Full Name:

Date:

**NEW EXEC POSITIONS**

**Please note core roles will be automatically visible on your society page by members.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Society** |  | **Effective From (Date)** |  | **Academic Year** |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Mandatory Positions** | **Name** | **Email Address** | **Mobile Tel No** | **Student No** |
| President  (Please note it is the Presidents responsibility to add on all other Execs, once the SU has given the President permissions, and in Term 1 once memberships have reset). |  |  |  |  |
| Treasurer |  |  |  |  |
| Welfare Officer |  |  |  |  |
| **Recommended Positions** | **Name** | **Email Address** | **Mobile Tel No** | **Student No** |
| Secretary |  |  |  |  |
| Safety |  |  |  |  |
| Equal Op’s |  |  |  |  |
| Environmental Officer |  |  |  |  |
| First Aider |  |  |  |  |
| Trips/Tours Officer |  |  |  |  |
| Ball & Socials Officer |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Optional Positions** | **Name** | **Email Address** | **Mobile Tel No** | **Student No** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**DETAILS AND PROOF OF ELECTION**

Please send all required proof of elections in a separate document alongside this handover pack to [studentactivities@warwicksu.com](mailto:studentactivities@warwicksu.com). For advice on running elections/example materials to help you minute or evidence your elections, visit **warwicksu.com > Societies and Sports Clubs > Exec Resources > Administration > Society Elections**

|  |  |
| --- | --- |
| **Date of last Annual General Meeting (AGM)** |  |
| **Date(s) of Elections**  Please include dates of:   * Announcement to society members of voting deadline (required week’s notice) * Nomination window (required to be at least a week long) * Voting period |  |
| **Name and contact details of Returning Officer** |  |
| **How were your elections held?** (please select one box) | ​​☐​ In-person elections  ​​☐​ Online (through SU Website)       *If you held your elections via this method we*  *do not require you to submit proof of*  *election.*  ​​☐​ Online (externally) |
| **If you held your elections online, but externally to the SU, please collect and submit the following as proof of election:**   * The format / site used for election (e.g. Google Forms etc.) and a brief outline of the process used to nominate candidates and collect votes   Please include a timeline (see above for dates to include)   * List of positions up for election & successful candidates * \*If in a teams call or equivalent, either a recording and/or minutes of the meeting. * Please include the number of votes cast for each candidate in the minutes. | **If you held your elections in person, please collect and submit the following as proof of election:**   * The format used for election (e.g. paper ballots etc.) and a brief outline of the process used to nominate candidates and collect votes   Please include a timeline (see above for dates to include)   * List of positions up for election & successful candidates * Minutes of the meeting. Please include the number of votes cast for each candidate in the minutes. * \*If the meeting was hybrid, can include a recording of the meeting. |

This is a statement to testify that the elections for \_\_\_\_\_\_\_SOCIETY NAME\_\_\_\_\_\_\_\_\_\_\_ on the date of \_\_\_\_\_\_\_\_ were held fairly, in line with Warwick SU’s regulations.

President’s Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_           Returning Officer’s Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   
   
President’s Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_           Returning Officer’s Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Socs Fair application:**

I can confirm that our Society \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_would/would not like to have a table at the Societies Fairs in September for the academic year of 2024-25 (Please delete as appropriate).

Will you need an accessible route to your table? YES/NO (please delete as appropriate).

If you wish to change your Society category you can request to do this now. Please note this cannot be consistently changed and it is not possible to do this at a later date. You can find your Society category on the SU website. You can email [studentactivities@warwicksu.com](mailto:studentactivities@warwicksu.com) to request to change this. Please note this needs to be done before the handover pack deadline.

# MEMORANDUM OF UNDERSTANDING

**WARWICK STUDENTS’ UNION & SOCIETIES**

**09 April 2024**

This agreement is between the Students’ Union and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, referred to in this document as the Society.

The Society and Warwick Students’ Union agree to the following principles. The objective is to produce a student run society, which is financially solvent, legally compliant, and provides development opportunities for members of the Society. The content of this memorandum is to be reviewed and agreed each year by the President of the Society and the Societies Officer and Democracy & Development Officer of the Students’ Union.

**The Society has ownership of and responsibility for its activities and associated risks, and responsibility for the financial operation, and general running of the Society.**

**The Students’ Union will support the Society in its activities.**

**1. Responsibilities of The Society**

**The Society and its executive officers will comply with the By-Laws, Regulations and requirements of the Students’ Union, including:**

**1.1** Memberships – *By-Law 5 Section 501-505*

**1.2** Members Code of Conduct – *Regulation 10*

**1.3** Data Protection, Social Media and Defamation – *Data/Social Media User Guide*

**1.4** Equality and Diversity – *By-Law 8*

**1.5** Use of Society Funds – *Financial Procedures FP12* and *Regulation 9*

**1.6** Democratic Process – *Regulation 9*

**1.7** Attendance at Exec Training – *By-Law 5 Section 510*

**1.8** Responsible Behaviour – *Anti-Social Behaviour and “Adoptions” Policy*

**1.9** Compliance with Team Warwick kit agreements

**1.10** Compliance with all SU Health and Safety guidance

**1.11** Appropriate recognition for and use of SU and University logos – *SU Branding Guide*

**1.12** Good housekeeping within SU venues and spaces

**All Warwick SU Bylaws and Regulations can be found on the website:**

[**www.warwicksu.com**](http://www.warwicksu.com) **> How the SU works > Governance**

**2. SU Support for The Society**

**The Students’ Union will support the Society in its activities and organisation, including:**

**2.1** Recognise and promote the Society and its memberships

**2.2** Provide information, training and guidance

**2.3** Provide a Finance service, processing payments and giving relevant and timely information

**2.4** Source suitable insurance for equipment and activities

**2.5** Review and sign specific contracts to limit the liability of the Society

**2.6** Give advice on the planning and running of specific events

**2.7** Provide a ticketing service and online ticket and merchandise facility

**2.8** Provide access to grants and budgets

**2.9** Act as arbiter for the Society when required

**2.10** Provide advocacy for the Society

**2.11** Provide online services, web presence and Society email system for communicating with members

**2.12** Provide space, subject to availability, in support of Society activity. Allocations of SU space for use on a long-term basis will be assessed annually.

**This agreement is authorised by:**

**VICE PRESIDENT FOR SOCIETIES (STUDENTS’ UNION)**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**PRESIDENT OF \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**SOCIETY CONSTITUTION**

**Date Recognised/Pending Approval (Delete and update as appropriate):** DD/MM/YYYY

If you wish to edit your current constitution this must be voted on at a General Meeting (EGM or AGM) by your members. These changes must be approved by the Societies Forum. If your constitution has changed in the last academic year but not been approved by the Forum, please email a copy of your new constitution to [societies@warwicksu.com](mailto:societoes@warwicksu.com) with all changes highlighted in red and select ‘pending approval’ on this sheet.

**1 Name**

* 1. The name of the society shall be Warwick Students’ Union NAME OF SOCIETY

**2 Aims and Objectives**

2.1 The Society shall have written statement of aims and objectives providing a clear understanding of the society. This shall be subject to review annually by the SOCIETY NAME Executive Committee

2.2 The society aims and objectives shall be:

2.2.1 Aims of Society 1

2.2.2 Aims of Society 2

2.2.3 Objectives of Society 1

2.2.4 Objectives of Society 2

2.3 The Society, its Executives, its funds and all its activities shall be subject to the provisions of the By-Laws, Regulations and Policy of the University of Warwick Students’ Union.

2.4 The Society shall be subject to a disciplinary code as laid down and administered by the Students’ Union.

2.5 Any alterations to the Society Constitution must be ratified by the Societies Forum. A provisional copy must be sent to the Vice President for Societies for approval before the new constitution may take effect.

2.6 If the Society has issues arising not mentioned in a personalised Constitution, then this document will become the default. Any issues may be dealt with by contacting your Societies Coordinator.

**3 Memberships**

3.1 Memberships of the Society shall be open to all full, associate and honorary members of the Students’ Union upon payment of the required Societies Federation subscription.

3.2 Memberships of the Society are to be renewed in the September of every academic year.

3.3 Only standard members of the society shall be entitled to vote in elections, provided they have joined the society and paid the appropriate subscription fee no less than three days before the election takes place.

3.4 The following shall not be entitled to hold the office of an Executive position in the society:

3.4.a An Associate or Honorary member of the Students’ Union or Societies Federation

3.4.b Any person who has received payment for the provision of services to the society (not including reimbursement of personal expenditure on behalf of the society)

3.5 The Society must have a minimum of 30 members by the sixth week of term one. If the minimum membership is not met, a meeting with the Society and their Societies Coordinator will be scheduled to discuss the future of the Society.

**4 Executive Committee**

4.1 The Society’s Executive Committee shall be made up of at least three Core Roles who shall be the President/Chair, the Welfare Officer and the Treasurer.

4.2 The Executive Committee must also ensure that they include an officer responsible for each of Core Responsibilities. These responsibilities may be put under the remit of other committee members’ roles, unlike the Core Officers, and do not need to be separate officers. However, they must be specified in the Constitution. The Core Responsibilities are as follows:

4.2.a Equality and Diversity

4.2.b Safety

4.2.c Secretary

4.3 The Executive Committee shall be responsible for the day to day running of the society and may decide upon any matter that has not yet been decided upon by the General Meeting. The Executive Committee shall further be responsible for:

4.3.a Organising the activities of the Society in such a way as to include the greatest possible number of Society members

4.3.b Managing the expenditure of the Society’s funds in a responsible fashion and in line with the aims, objectives and planned activities of the Society whilst adhering to the SU’s financial regulations

4.3.c Formulating and submitting an annual bid for funds from Student Activities prior to any specified deadline which shall include a statement of activities and objectives for the coming year and detailed justification of the figures contained in the bid

4.3.d Formulating and submitting any additional bids for funds from the SU Societies Forum or groups within the Students’ Union

4.3.e Assisting any review of the Society’s activities and use of funds carried out by a standing committee or group of the Students’ Union that has granted funds to the Society

4.3.f Upholding the Constitution of the Society and ensuring that its aims and objectives reflect the Society activities

4.3.g Ensuring that all society activity abides by the By-laws, regulations and policy of Warwick SU.

4.3.h Executive Committee members must attend assigned training to ensure they are equipped to organise the Society.

4.4 **Core officers**

4.4.1 The Core Officer Duties shall include:

4.4.1.a To attend the Society’s Annual General Meeting

4.4.1.b To attend Societies Council and complete mandatory training sessions/courses

The core officers shall be:

4.4.2 **President/Chair/Club Captain**

4.4.2.a The President/Chair/Captain should organise and oversee the running of The Society

4.4.2.b The President/Chair/Captain should chair committee meetings

4.4.3 **Treasurer**

4.4.3.a The Treasurer should be responsible for the finances of the Society

4.4.3.b The Treasurer should maintain an up-to-date record of their group account in addition to the record kept by the SU finance office

4.4.3.c All funds should be held and processed through the groups Students’ Union bank account. No money should be held in personal bank accounts

4.4.3.d The Treasurer should submit grant funding applications

4.4.4 **Welfare Officer**

4.4.4.a The Welfare Officer should be responsible for signposting Society members to the University’s and SU’s support services when a welfare issue arises

4.4.4.b The Welfare Officer should make it known among Society members that they can come to them for initial support, however, should expect that support will take the form of signposting and not advice

4.4 **Additional Officers**

**<The sample additional officers section is an example. Societies may add or remove as many additional officers as required>**

4.4.1 **Events Officer**

4.4.1.a The Events Officer should

4.4.1.b The Events Officer should

**5 Meetings**

5.1 The Executive must meet at least three times per term to ensure the Society is operated to a high standard.

5.2 The Society Executive shall call at least one General Meeting per year for the purposes of discussing plans and activities for the coming year. This must be held by Week 10, Term 2. This GM may also be used to hold Society Officer elections.

5.3 The Society Executive shall give at least seven days’ notice of any General Meeting to all members via Society email and such notice shall include details of any elections to be held

5.4 The Executive shall call further meetings either at its own initiative or at the request of 10% of the membership or the request of the Vice President for Societies.

**6 Elections**

6.1 Elections shall be held online or at a quorate general meeting in line with By-Law 10 Appendix D

6.2 Votes will be counted a First Past The Post/Single Transferrable Vote electoral system.

6.3 Any amendments to the constitution must be made by the end of term 3.

6.4 The renewed Constitution, with up to date signatures, must be sent to the Societies Coordinator before the end of term 3

|  |  |  |
| --- | --- | --- |
| Position | Name | Signature |
| President (Incoming) |  |  |
| President (Outgoing) |  |  |

**SOCIETY EQUIPMENT INVENTORY**

Include all the equipment owned by the society in this inventory. These details will be forwarded onto our insurance company so any items not listed below will not be insured, or mark as N/A if there is no inventory.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ***Item*** | ***Storage Location*** | ***Quantity*** | ***Condition*** | ***Date Purchased*** | ***Owned By*** | ***Approx. Value*** | ***Notes*** |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| ***Equipment the society would like to/is planning to purchase in 2024-25*** | | | | | | | |
| ***Item*** | | ***Planned Storage Location*** | | ***Approx. Cost*** | ***Notes*** | | |
|  | |  | |  |  | | |
|  | |  | |  |  | | |
|  | |  | |  |  | | |
|  | |  | |  |  | | |
|  | |  | |  |  | | |

**SOCIETY ANNUAL RISK ASSESSMENT**

**Risk assessment training must be completed by 2 members of the committee before you finish this risk assessment. See link here: https://moodle.warwick.ac.uk/course/view.php?id=37594**

**Please send in a copy of the certificates you receive upon completion of the training along with the handover pack.**

If you are planning any outreach work during your time as an Exec (e.g. volunteering in schools or the local community, working with external partners, etc.) you must contact [studentactivities@warwicksu.com](mailto:studentactivities@warwicksu.com) and consider this in your risk assessment below. Please see some examples below for your risk assessment and add/amend as appropriate.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Person/People completing risk assessment:** | | **Name of Club/Society:** | | | | **Date (DD/MM/YYYY):** | | | |
| **Possible** [**Hazards**](https://www2.warwick.ac.uk/services/healthsafetywellbeing/managingrisks/hazidentification/) | **How may these hazards impact your event?** [**Who may be at risk?**](https://www2.warwick.ac.uk/services/healthsafetywellbeing/managingrisks/peopleatrisk/) | | **Initial**  [**Risk Level**](https://www2.warwick.ac.uk/services/healthsafetywellbeing/managingrisks/riskassess/matrix_for_risk_evaluation.pdf)  (**VL,L,M,H,VH**) | **What co**[**ntrol measures**](https://www2.warwick.ac.uk/services/healthsafetywellbeing/managingrisks/riskcontrols/) **will be put in place to mitigate the risks?** | **Who will be putting these control measures in place and by when?** | | [**Risk level**](https://www2.warwick.ac.uk/services/healthsafetywellbeing/managingrisks/riskassess/matrix_for_risk_evaluation.pdf) **after control measures are in place.**  (**VL,L,M,H,VH**) | **If this hazard did occur anyway, what action would be required and by who?** |
| ***Prompts for possible hazards that may occur. Add more if there are other ones specific to your event.*** | ***Please elaborate on each prompt to show the specific impact the hazard might have on your event. Please include who may be affected eg. Members, general public, exec etc.*** | | ***You should consult the table at the end of this document for the initial risk level and enter it here.*** | ***List control measures here that will be used to reduce the risk level.*** | ***Who is responsible for implementing controls (eg. “Events officer”), and when will these actions be completed by.*** | | ***List the new risk level here based on the additional control measures.*** | ***Actions required to control and manage the hazard if it occurs, and who will complete the actions?*** |
| **ACCIDENTS OCCURING IN THE ROOM/VENUE** |  | |  |  |  | |  |  |
| **FOOD POISIONING/DIETARY REQUIREMENTS/ ALLERGIES** |  | |  |  |  | |  |  |
| **MEDICAL CONDITIONS/FIRST AID** |  | |  |  |  | |  |  |
| **LOSING MONEY ON BOOKINGS**  **e.g. cancellations, not reaching minimum numbers** |  | |  |  |  | |  |  |
| **ACCESSIBILITY** |  | |  |  |  | |  |  |
| **ACCIDENT OCCURING WHILST TRAVELLING TO VENUE** |  | |  |  |  | |  |  |
| **ALCOHOL CONSUMPTION**  **e.g. alcohol poisoning, spiking** |  | |  |  |  | |  |  |
| **SEVERE WEATHER CONDITIONS** |  | |  |  |  | |  |  |
| **ACCIDENT INVOLVING ELECTRICAL EQUIPMENT**  **e.g. safety/transit etc** |  | |  |  |  | |  |  |
| **STOLEN/LOST BELONGINGS** |  | |  |  |  | |  |  |
| **DISRUPTIVE BEHAVIOUR** |  | |  |  |  | |  |  |
| **ANIMALS INVOLVED IN ACTIVITIES e.g. Who is responsible for them, bites, allergies** |  | |  |  |  | |  |  |
| **CONTROLLING CAPACITY NUMBERS** |  | |  |  |  | |  |  |
| **FIRE/ HEALTH & SAFETY** |  | |  |  |  | |  |  |

**Risk Assessment matrix**

**Risk Rating**

Risk is the combined assessment of the likelihood and severity for any given hazard, so therefore there are two elements that you will need to look at when assessing the level of risk:

**Risk Severity**: (the severity of any resulting injury or ill−health)

MINOR: Superficial injuries - cuts, bruises, mild skin irritation, mild aches, and pains − requiring first aid only. Minor property damage.

**SERIOUS**: More serious injuries or ill-health, requiring time off work or study or a hospital visit, e.g. burns, sprains, strains and short-term musculoskeletal disorders, cuts requiring stitches, back injuries, fractures to fingers or toes. More serious property damage.

**MAJOR**: Broken limbs, amputations, long-term health problems resulting from work, or acute illness requiring medical treatment, loss of consciousness, serious electric shock, loss of sight. Major property damage.

**EXTREME**: Injury or ill-health which leads to death either at the time or soon after the incident, or eventually, as in the case of certain occupational diseases, such as asbestos-related cancers.

**Risk Probability**: (the likelihood of the hazard causing harm).

**VERY UNLIKELY**: Good control measures are in place. Controls do not rely on a person using them (i.e. personal compliance). Controls are very unlikely to break down. People are very rarely in this area or very rarely engage in this activity.

**UNLIKELY:** Reasonable control measures are in place, but they do rely on a person using them (some room for human error). Controls unlikely to breakdown. People are not often in this area / do not often engage in this activity / this situation is unlikely.

**POSSIBLE:** Inadequate controls are in place, or likely to breakdown if not maintained. Controls rely on personal compliance. People are sometimes in this area or sometimes engage in this activity / this situation sometimes arises.

**LIKELY:** Poor or no controls in place. Heavy reliance on personal compliance (lots of room for human error). People are often in this area / engage in this activity on a regular basis / this situation often arises.

Use this matrix to find your risk score for each identified hazard:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Severity** | | | | |  |  | **Risk Level** |
| **Likelihood** | Superficial | Minor | Serious | Major | Extreme |  | **Very low** | Acceptable risk - no action required |
| Unlikely | **Very low** | **Very low** | **Low** | **Low** | **Moderate** |  | **Low** | Tolerable risk - further control measures not required, but status must be monitored |
| Possible | **Very low** | **Low** | **Low** | **Moderate** | **High** |  | **Moderate** | Further control measures required to reduce risk as far as is reasonably practical |
| Likely | **Low** | **Low** | **Moderate** | **High** | **Very high** |  | **High** | Urgent action required to allow activity to continue |
| Very likely | **Low** | **Moderate** | **High** | **Very high** | **Very high** |  | **Very high** | Risk intolerable - activity must cease until the risk has been reduced |
| Certain | **Moderate** | **High** | **Very high** | **Very high** | **Very high** |  |  |  |

**Grant application**

The SU provides grants to Societies from the money collected through Societies Federation memberships, with the aim of helping Societies improve the experience of their Members by:

* Investing in equipment (not consumables)
* Expanding the range of the Society’s activities (by doing new things rather than increasing the scale of existing activities)
* Promoting the Society to potential new Members (with materials, such as banner stands, rather than online or printed advertising)
* Changing the Society’s operational model to enable it to be more sustainable (a one-off reorganisation to become financially independent)

Please complete the below, funding will be awarded in Term 1 of the next academic year: (**Take the time to look on the SU website to check what can and cannot be awarded**. Please note: any Society that does not submit a grant application by the handover pack deadline, will not receive any funding for the 2024-2025 academic year.) [Grants (warwicksu.com)](https://www.warwicksu.com/societies-sports/exec-resources/finance/budgets/)

If you have current Society funds, what do you plan to spend these on? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| **Categories (see below examples)** | **Item (provide a link if applicable)** | **Amount** | **Purpose/benefit to Society** |
| EQUIPMENT |  |  |  |
| BANNERS |  |  |  |
| COSTUMES/PROPS |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Exec Quizzes/Training**

Exec quizzes are compulsory. Please complete the below once the training has been completed. The Exec quizzes can be found on the SU website: Societies & Sports > Exec Responsibilities > Exec Training > Quizzes

These are monitored and if not completed sanctions may be implemented.

|  |  |  |  |
| --- | --- | --- | --- |
| **Quiz type:** | **To be completed by: (This is an advisory, any other Execs can complete these if they think it would be beneficial to them/the Society)** | **Date Completed:** | **Signed and confirmed:** |
| GDPR training | President |  |  |
| Welfare Quiz | Welfare Officer |  |  |
| Handover pack training | President |  |  |
| Finance training Quiz | Treasurer |  |  |
| Event Planning Quiz | Any two Execs responsible for this position. If only one person overseeing Events then the President also needs to complete this |  |  |
| External Speakers Quiz | (If applicable to the Society) Any Exec responsible for this position |  |  |
| Sponsorship Quiz | Treasurer |  |  |

Risk assessment Training (as stated with the annual risk assessment):

Risk assessment training is compulsory for 2 Execs. The training can be found here: [Course: Health and Safety - Risk Assessment training | Moodle@Warwick](https://moodle.warwick.ac.uk/course/view.php?id=37594)

|  |  |  |
| --- | --- | --- |
| **Name** | **Date completed** | **Sent certificate to SU (Please send this in the same email as your handover pack)** |
|  |  |  |
|  |  |  |

Please note: If the Exec quizzes are not completed, you will not be eligible for a table at the Societies Fair or for Society grants.

Event Deadlines – planning for the year ahead, take note of SU deadlines for your events! Please read and sign to the agreed deadlines below, even if you currently have no plans for these events.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date of Event** | **Event pack deadline** | **Ticketing request** | **Payments** | **Read and agreed SIGN HERE:** |
| External speakers | Not needed if funds are not being spent, however the external speaker form needs completing 21 days before the event | N/A unless part of a paid event with speakers or free tickets | Please be aware online MRF’s can take a week to be processed |  |
| Ball Term 1 | Term 3 of the academic year before – we are available to be contacted over the Summer but need to know plans before Term 3 finishes. Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Complete all financial transactions at least 2 weeks before the event |  |
| Ball Term 2 | Term 1 week 8 - Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Complete all financial transactions at least 2 weeks before the event |  |
| Ball Term 3 | Term 2 week 8 - Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Complete all financial transactions at least 2 weeks before the event |  |
| General event Term 1 | Minimum of 2 weeks prior to event - Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Please be aware online MRF’s can take a week to be processed |  |
| General event Term 2 | Minimum of 2 weeks prior to event - Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Please be aware online MRF’s can take a week to be processed |  |
| General event Term 3 | Minimum of 2 weeks prior to event  Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Please be aware online MRF’s can take a week to be processed |  |
| Domestic Trip Term 1 | 4 weeks prior (take holidays into account to allow packs to be processed)  Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Complete all financial transactions at least 2 weeks before the event |  |
| Domestic Trip Term 2 | Term 1 - 4 weeks prior (take holidays into account to allow packs to be processed)  Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Complete all financial transactions at least 2 weeks before the event |  |
| Domestic Trip Term 3 | Term 2 - 4 weeks prior (take holidays into account to allow packs to be processed)  Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Complete all financial transactions at least 2 weeks before the event |  |
| International Tour Term 1 | Term 3 of the academic year before – we are available to be contacted over the Summer but need to know plans before Term 3 finishes  Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Complete all financial transactions at least 2 weeks before the event |  |
| International Tour Term 2 | Term 1 – week 8  Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Complete all financial transactions at least 2 weeks before the event |  |
| International Tour Term 3 | Term 2 – week 8  Allow time for amendments to financial planner to be made if necessary | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing | Complete all financial transactions at least 2 weeks before the event |  |
| Ticketing | Event pack needs to be approved before tickets can go on sale.  **TICKETS CANNOT BE DONE EXTERNALLY TO THE SU** | Min. 5 working days notice for tickets, once final version financial planner has been approved  No external ticketing allowed | N/A |  |