Introduction

Curtin Psychology Society Training Document

Make a copy of this training document and include the year - the Handover committee is responsible for ensuring the information is up to date.

This document lists all the required training for each committee member. A training event will be held before the first semester of the year in which the committee will gather and go through the whole committee mandatory training together, and the old committee will teach the new members to use all necessary programs especially TidyHQ and the Discord server.

Committee members with additional modules such as the Executive or Marketing team will need to complete their training and upload evidence of it into the training folder.

If you are a newcomer throughout the year please ensure that you thoroughly revise all applicable sections of this document so you are up to date with the training.

Below is a list of the Roles and Responsibilities:

https://curtin-psych.tidyhq.com/public/storage/f/94079ff64bbea727bb74c3b0c3d41709/CPS-Committee-Info-Pack.pdf

Please ensure that you familiarise yourself with these roles so you know where your own responsibilities start and end, what is expected of you and the average time commitment per role.

If the links do not work - all of these worksheets are available in the training section of the TidyHQ file storage and Club HQ.

Mandatory for all Club Committee Members.

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In order to boost clubs into the year, we will take you through some mandatory processes for Guild-affiliated clubs. The course will also provide club committee members with the tools, skills, confidence and knowledge to successfully run their club, engage their members and manage your club administration effectively.

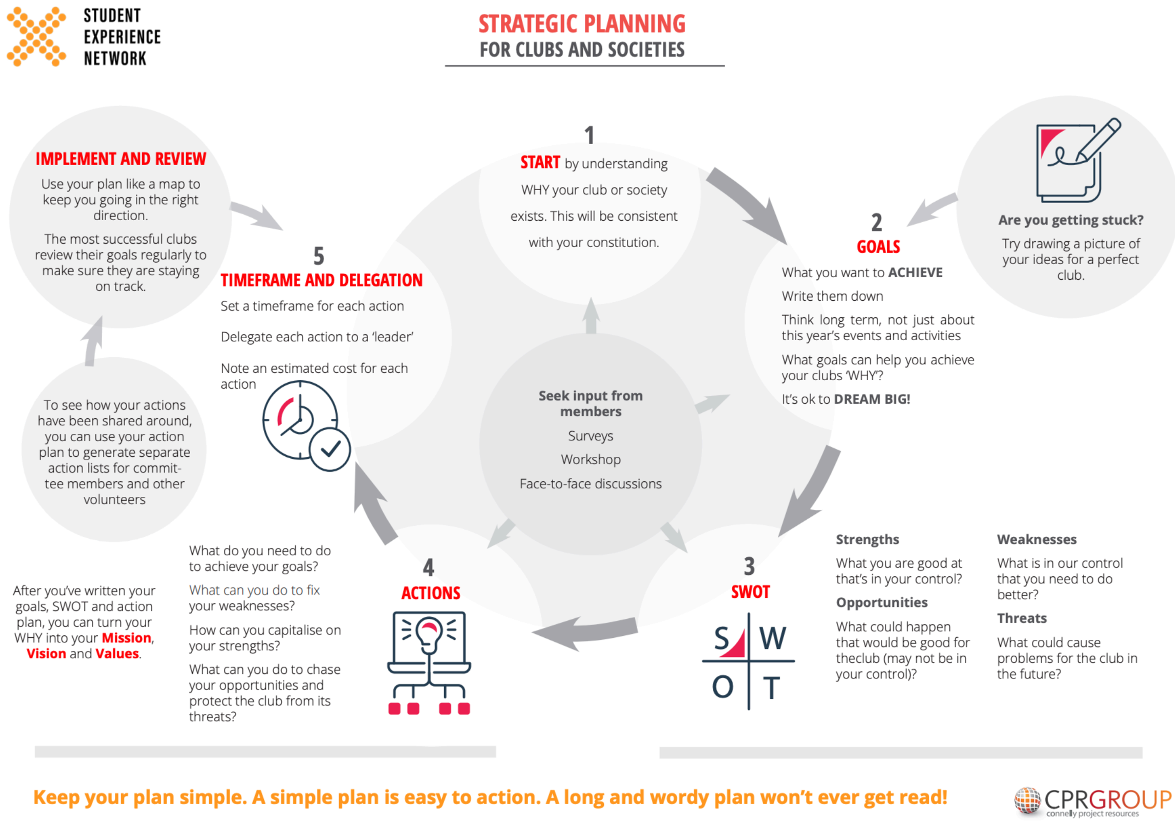
Delivered by the professional staff within the Club Support team.

Topics include:

- Club Governance - Guild Requirements & TidyHQ
- Club Anatomy - Committee Roles & Responsibilities
- Club Meeting Procedures
- Strategic Planning
- Financial Management Basics
- Strategic Planning

Activity 1

In the training meeting we will be going through the SWOT analysis together



Goals

'Why?'	
When thinking about your goals for the club, it's important to think about your 'WHY	
What is your big WHY? Why does the club exist?	- Feel passionate about mental health - Talk about things related to psychology and talk to people with similar interests - Promoting and advocating for good mental health and health in general

What do you want to achieve?	
If you get stuck try drawing a picture of your ideas for the perfect club.	
What would your club like to achieve in the short term (this year)?	- Events - hopefully they will go through - Advocacy of mental health - Involving more members - More committee member - Increase our social media presence

'Over-the-horizon' thinking	
'Over-the-horizon' thinking helps you set longer-term goals that can keep everyone in your club engaged in trying to achieve great things.	
What would your club like to achieve in the long term?	- CONTINUE THE CLUB ONTO 2027 - Sponsors - Membership turnover to improve

Dream Big!	
It's ok to dream big.	
What are some ambitious and big dreams for your club?	- Merch - To grow as a community - Ball - Be more active - Get to 500 members

Then this document will be filled in as a team. It will allow us to identify our strengths and weaknesses as a team.

Activity 2 - Scenario Discussions

This activity is important as it allows the whole committee to have some awareness of realistic issues that could arise throughout the year and work together as a team to figure out how to solve them.

Scenario 1

Your club Treasurer has suddenly stepped down and resigned from their role, saying that work and university responsibilities prevent them from doing their job.
Discussion Questions:

1. How will this affect the club in the immediate future?
And what problems might arise because of this?

- No one to look after the finances
- Transfers and log book will become out of date
- BANK SIGNATARY (finances can't be handled by anyone else)
- Members are adapting to fill the gap so reducing the effort put into their own roles

2. Without checking any resources, what are your first thoughts about how to address this situation?

- Chat with them and see what they can do, even to do a handover to other committee member
- Clear and transparent communication with the committee

3. Next, check club policy and Guild resources.
What did you find to help you address this situation? and where did you find it? If you didn't find anything, what will you do for help?

- Guild website (Safe space agreement, Constitution, Governance)
- Talk to Luke or Shelley around protocol

4. Now the Secretary has suddenly resigned.
How do you fill both of these vacant positions?

- Organise a meeting with the Guild around filling positions
- Have a meeting with the society's committee to talk about a way forward
- See if anyone is available to step up

Scenario 2
The club's President has not read or responded to messages and emails for over 2 weeks. They have missed the last two committee meetings saying they are busy and "to handle the club yourselves".
1. How will this affect the club in the immediate future?
And what problems might arise because of this?

- No one overseeing anything
- They are first point of contact after the secretary to handle any business for the club - affect sponsorships, events, marketing - meetings with chairman and everything
- Limit communication - club's leadership/exec team is affected

2. Without checking any resources, what are your first thoughts about how to address this situation?

- Vice president takes on the role as well secretary
- Have a private meeting with president - talk about expectation

3. Next, check club policy and Guild resources.
What did you find to help you address this situation? and where did you find it? If you didn't find anything, what will you do for help?

- Meeting with Guild - we would lose the club otherwise
- Email Luke and Shelley first for what to do with this situation
- Talk to the rest of the exec team on distributing workload while we deal with this situation (VP role will have to be reiterated)
- Guild website, governance, constitution…

4. Can the club continue without an active President or no President?
And is it possible to remove, or replace the President? What would be the process?

- No
- It is possible to replace the president but also use the vice president as stand in until that is sorted - through Guild

Scenario 3

The club would like to hold a camp so members can socialise and hangout. The committee has been tasked to organise the camp.
1. Without checking any resources, what are the first steps to organise the camp?
Make a list.

- Permission from guild
    - Risk assessment
- Look at the budget first
- Resources that are needed - Food
- Location
- Availability of committee members

2. Next, check club policy and Guild resources.
What did you find to help you address this event? and where did you find it? If you didn't find anything, what will you do for help?

- Guild approvable
- Risk assessment
- Guild documentation (Constitution, Governance and SAFE SPACE AGREEMENT)

3. Under what criteria could you hold a camp?

How could you propose holding this camp to the Club Support Team? What other options could you do instead of holding a camp?

- Committee bonding event
- “Mental health week” event
- Increase memberships

Scenario 4

The committee is planning an off-campus Sundowner as cheap as possible. The Secretary has a friend who owns a warehouse who can give the club a cheap rate. The committee can buy alcohol and run the bar themselves, and food platters can be bought at Costco.

1. Discuss amongst the group what you would need to put this event on?
What jobs would the committee have to do? Make a checklist.

- Guild Approval - venue, food, alc.
- Sort the website for expenses - buying tickets for the sundowner
- Responsible for food catering, RSA checks, Food safety cert, Managerial cert
- Setting up the warehouse - decorations, tables…etc
- Finances for the club
- If we have sponsors, someone needs to communicate with them
- Advertising/having a social presence around the event

2. Next, check club policy and Guild resources.
What did you find to help you address this event? and where did you find it? If you didn’t find anything, what will you do for help?

- Email Luke and Shelley for help if nothing can be found
- Go through Guild, run an event under clubs and choose a category according to what you need (either on campus or off campus)

3. What may need to be changed to make this event compliant?
Refer to your previous checklist. What needs to change?

- Running the bar themselves, how many committee members do you have? How many on the floor, enough to check on everything, licensed venue and bartender
- Making sure the food is inclusive, vegan, vegetarian, halal…etc and making sure it is stored correctly before and during the event to prevent food poisoning and safe handling of food

Activity 3 - Difficult conversations workbook

Recommended to do the Thomas-Kilmann Conflict Model and discuss results

Worksheets

Committee went through worksheets and we discussed the differences and details of each other's responses

Activity 4 - Planning the Inaugural Meeting (open to members)

Inaugural Meeting Resources

Inaugural Meeting

See in the subtabs the planning and meeting documents

Slideshow

Inaugural Meeting

- [ ] All the videos that define the structure of the club

Notice to Members and Agenda Template

2. Agenda - Inaugural Meeting TEMPLATE.docx

Attendance Sheet (includes nominations) 4.Meeting Attendance Sheet.docx

Meeting Minutes 5. Minutes - Inaugural Meeting TEMPLATE.docx

Inaugural meeting documents were discussed

Activity 5 - Committee Contact Details

THIS DOCUMENT (ONCE FILLED) SHOULD BE UPLOADED TO TIDYHQ INDEPENDENTLY AND EASILY ACCESSIBLE

20XX Club Committee Contacts List.xlsx

Activity 6 - Identify Club Affiliation

Sponsors

Organisation List company name	**Contact Person** List Name	**Role** or identify who they are: i.e: Curtin staff, adviser etc	**Relationship** add detailed information to explain the relationship between the club and the organisasion/person/group	**Contact Details** Phone, email etc.

Affiliations & Other Partnerships

Organisation List company name	**Contact Person** List Name	**Role** or identify who they are: i.e: Curtin staff, adviser etc	**Relationship** add detailed information to explain the relationship between the club and the organization/person/group	**Contact Details** Phone, email etc.
Ancarta	Ruby Grace	Founder	Gives 30% off for memberships	Insta: rubygraceee
headspace Cannington	Jenna Dilworth, Tameisha Shelton & Georgia Neill	Community Engagement & Youth Access Worker	Provides services and resources to memberships as well as attending events	9358 5800 or reception@headspacecannington.com.au. Details to go through Georgia as works at the company

Planning the Inaugural Meeting (open to members)

Planning the Inaugural Meeting (open to members)

Inaugural Meeting Resources

https://drive.google.com/drive/u/0/folders/1JI7WIQIWeo7048V9NIBx-TkEyKKua-aZ

Slideshow

https://drive.google.com/drive/u/0/folders/1JI7WIQIWeo7048V9NIBx-TkEyKKua-aZ

- [ ] All the videos that define the structure of the club

Notice to Members

https://docs.google.com/document/d/1ITtCPTxdfvF9oIHD19rxVpZ9fdbsM17M/edit

Inaugural Meeting - Notice to Members

[club name]

Date / Time / Location (include video link)

Member Invitation

All members are invited to the club's inaugural meeting where we will establish the club in order to apply to register with the Curtin Student Guild so that we can run at Curtin University. You can have your say in the future of the club. To run a successful meeting, we need Curtin student members like you to attend to ensure the club is running in the best interests of its members.

Included in the invite:

- The agenda for the meeting
- The club constitution & policy
- Call for nominations
- Committee position descriptions

At the meeting, ordinary members (curtin student members) will have the opportunity to:

- Speak about items on the agenda,
- Elect the club's committee.

Attendance

Members can attend in-person or online. It is helpful if members register their attendance so that the club can manage attendance numbers.

Submit a Motion

Ordinary members (curtin student members) can submit a motion to add to the agenda if they wish. Please submit via email. **Submissions Close:** [add date & time]

Call for Nominations

Nominations for the club's committee positions are now open. To help you consider nominating for a role, check out the following:

- List of roles, position descriptions (add link or attachment)
- YouTube playlist consisting of 5 short videos about how to run the club.
- Committee structure overview, see here.

- Additional benefits of becoming a committee member - you can add more info here if you wish (i.e. gain leadership experience, connecting with industry partners to gain connections for future employment opportunities after graduation etc. **include the Curtin Extra Program**

All ordinary members (Curtin student members) are invited to submit a nomination for a committee role. Roles will be elected by Ordinary Members in attendance at this meeting. If you cannot attend the meeting, you may still submit a nomination however, you cannot cast a vote without attending.

- Executive committee roles will be elected at the meeting. Nominations are open, submit yours via [add link or email]. **Submissions Close:** [add date & time]
- Other committee roles may be elected at a later date as determined by the new committee elected at this meeting. Additional roles may be added as needed. Expressions of Interest are open, submit yours via [add link or email].

Please continue to complete the Agenda template on the next page.

Agenda Template

CLUB NAME

Inaugural Meeting Agenda

Date / Time / Place

1. **Attendance**

2. **Open Meeting**

3. **Disclosure of any potential or perceived conflicts of interest**

4. **Purpose of the Meeting**
   To establish the club in order to apply to register with the Curtin Student Guild so that we can run at Curtin University.

5. **Club Name**
   The ordinary members will discuss and agree on the name of the club. It must Include “Curtin” and “Club/Society/Association.” Proposed names for consideration are:
   - list any proposed names to be discussed at the meeting.

6. **Club Purpose & Objectives**
   The ordinary members will discuss and agree on the club’s purpose & objectives.
   - list any proposed objectives to be discussed at the meeting.

7. **Election of Committee Roles**

   7.1. President:
   7.2. Treasurer
   7.3. Secretary
   7.4. Other (please list if adding more)

8. **Acceptance of the Guild's Policy**
   In order to become a club Curtin, the club will discuss and agree to follow the Curtin Student Guild's Club Governance policy documents:

   8.1. Guild's Default Club Constitution
   8.2. Clubs Charter & Club Policies
   8.3. The Safe Spaces Agreement

9. **Club Membership Fee**

10. **Open a Club Bank Account**

11. **Other Business**

12. **Next Meeting**

13. **Close Meeting**

Please ensure you update the role descriptions template and include it in your email invite.

20XX Inaugural Meeting

20XX Inaugural Meeting

Attendance Sheet (includes nominations)

CLUB NAME

Inaugural Meeting

Date / Time / Place

ATTENDANCE

Attendee to complete			**Minute taker to complete**	
Full Name	**Signature** initial	**Curtin Student Number** or identify who you are: i.e: staff, adviser, Guild, Curtin College, UWA student etc.	**Current Club Member** Y/N	**Eligible to vote, run for a role, make decisions** Y/N

Online Attendees				

Inaugural Meeting Minutes Template

Date / Time / Place

The wording in this template is designed for the Chair of the meeting to follow & read in the meeting.

1. **Attendance:** Appendix one (attach attendance sheet)

   All in-person attendees must sign-in so that membership status and voting eligibility can be assessed.

   Those online should sign-in via a private chat message to the meeting organiser by entering the following information:

- Full name,
- Curtin Student ID,
- If you are not a Curtin student, please identify who you are and note that you may observe only unless invited to speak by the chair: ie. Curtin Staff, Club advisor, Chaplain, Guild representative, Curtin College Student, UWA Student or other.

   The minute taker will:

- review the attendance list again to identify who may not be eligible to vote or hold a committee role.
-

2. **Open Meeting**
   The meeting opened/commenced at [time].

   Acknowledgement of the Traditional Owners:
   "We wish to acknowledge the traditional custodians of the land we are meeting on, the Whadjuk people. We wish to acknowledge and respect their continuing culture and the contribution they make to the life of this university, city and this region"

3. **Disclosure of any potential or perceived conflicts of interest:**

4. **Purpose of the Meeting:**
   This meeting is to establish the club/society/association and register with the Curtin Student Guild at Curtin University. We will now address the agenda items.

5. **Club Name**
   The name of the club/society/association is be:
   [list name as agreed in the meeting amongst majority of the ordinary members present]

6. **Club Objectives & Purpose**
   [list official objectives as agreed in the meeting amongst majority of attendees]

7. **Elect Committee Roles**
   As agreed [by the majority OR unanimously by] the ordinary members present at the meeting, the following members were elected and have accepted the role:

Upload Meeting minutes to TidyHQ

Executive Only

Executive Only

Please fill out the Office Bearers Statement.
Paste the completed copy here and also upload it to the 2026 Committee Training

https://s3.tidyhq.com/orgs/7706ba5012cb/attachments/f61588ad2c3bdb011f84c6712a7a133cc2dae82b/Office_Bearers'_Statement_-_Fillable_%28ID_53813%29_%28ID_235606%29.pdf

What do the Executive roles entail?
Watch this youtube video that gives you a breakdown of the roles and responsibilities

Financial Management

Mandatory for all committee members
Financial management is not just the job of the treasurer - the entire committee is accountable for the financial performance of your student association and every committee member should have a good understanding of how to read and interpret the club's finance reports.

The Guild have the right to access to the financial records of the club via the provided financial management software and may audit or review club financial records at any time to ensure compliance and financial responsibility, and verify that transactions have been accurately reported. Accurately recording club's financials records on a regular basis is a very important for the club's financial health and success. When records are up-to-date, Treasurers can provide the club's financial status at Club Committee Meetings where decisions are made to spend club funds such as running events, purchasing merchandise etc.

Clubs and their officers must complete the club induction course module for Financial Management which includes:

- Committee Responsibilities & Accountability
- Record Keeping: Maintaining receipts and invoices for all expenses & how to record income and expenses.
- Budgeting & Reporting
- Reconciling Accounts and how to Balance Books. Finances must be recorded in the provided financial management software and account should be balanced monthly.
- Financial Safeguards & Delegations
- Handling cash

- and more.....

Sourcing Sponsors

How can managing your finances, grants and funding sources not be reactive, but proactive? This workshop will allow leaders to maximise the value delivered to their students, support innovative ideas coming to life while meeting financial requirements necessary for the long term success of the student group. You will learn how to:

- Identify sources of funding available at your university
- Describe what is required to meet the funding/grant requirements and where to access necessary application forms/processes
- Build a budget for an event and the year ahead
- Identify potential costs for their group over the calendar year
- Diversify income sources to maximise value delivered to students

Delivered by Josh Farr - Campus Consultancy. Learn more about Josh and his history leading his own club in 2013 and delivering training to University clubs across Australia.

President + Vice

President + Vice

Presidency Role Description
The President is the leader of the Club, responsible for overseeing all operations, ensuring the Club's goals are met, and representing the club within the university and broader community.
Expectations and Time Commitment Provide

- Strategic direction and set the vision for the club.
- Chair meetings, ensuring agendas are followed and decisions are made effectively.
- Act as the primary point of contact for university staff, external organisations, and sponsors.
- Support and guide the executive team in fulfilling their roles.
- Ensure adherence to the club's constitution and university regulations. Handle conflict resolution and decision-making in challenging situations.
- Represent the club at university events and liaise with other student organisations.

Weekly commitment: 10 hours

TAG Governance Training
This collection of youtube videos is recommended for these roles so you have a complete understanding of your role and the jobs that your committee have.

As president, you will have all access to all permissions. It is up to you and your team to decide who does what, and what they can access on Discord and on TidyHQ
- Video on how to set up / run a discord Server

You need to be on top of communications between your team and the members, keep it engaging, periodical, and to the point. This short TEDTALK does an amazing job explaining how to lead through effective communication.
- Effective leadership communication

Secretary

Secretary

Role Description
- The Secretary manages the club's administrative tasks and ensures effective communication within the executive team and with members.

Expectations and Time Commitment
- Schedule, organise, and take minutes for all meetings.
- Maintain an organised record of club documentation, including meeting minutes, membership lists, and correspondence.
- Ensure members are informed about upcoming events, meetings, and other important updates.
- Assist the President in preparing agendas and distributing materials.
- Handle general inquiries from members and external parties, by way of managing the club's email.

Weekly commitment: 7 hours

Meeting Minutes and Agenda

Meeting Guide
https://drive.google.com/drive/u/0/folders/1YIbCZwk5Y53UWQwVKadmm5MTN0jIlkyV
- [ ] I have read and understood this document

Meeting Basics
https://drive.google.com/drive/u/0/folders/1YIbCZwk5Y53UWQwVKadmm5MTN0jIlkyV
TAG Club Governance Training: Meeting Basics
- [ ] I have read and understood this document

How to prepare and submit motions
https://drive.google.com/drive/u/0/folders/1YIbCZwk5Y53UWQwVKadmm5MTN0jIlkyV
TAG Club Governance Training: Motions in Meetings
- [ ] I have read and understood this document

Tips on how to avoid a Lack of Quorum
Quorum - Required number

A lack of quorum may suggest the following concerns:
- **Member Engagement.** Members may not be engaged or interested in the club's activities, which could point to a low level of demand. If members aren't attending AGMs or showing up for voting, it could be a sign that they don't feel invested in the club, or perhaps the club isn't offering what members want or expect.

- **Communication Issues.** It's possible that members aren't aware of the AGM or have not been properly notified. Poor communication can lead to low attendance, even if there is demand for the club in other ways.
- **Scheduling Issues**: The timing and frequency of AGMs may not align with members' availability, leading to a low turnout. If the AGM is scheduled at an inconvenient time, it could affect quorum. For some academic clubs, plan and study the academic calendar & your cohort's other likely schedules (i.e. 4th years on prac during certain months).
- **Membership Size**: In some cases, clubs require a larger number of members to meet quorum. If the club has a small membership base, it might struggle to get enough people present for a vote. This doesn't necessarily indicate a lack of demand for the club in general, but rather a specific structural or logistical challenge.
- **Leadership Issues**: The club might be facing leadership or organizational problems. If there's a lack of clear direction or leadership, members may not feel motivated to attend meetings or get involved.
- **Club's Objectives (Purpose & Relevance)**: If the club is failing to attract participation and engagement, it could also be a sign that the club's activities or mission no longer resonate with its targeted cohort. This might suggest a lack of relevance or demand for the club's existence. Consider ways to identify what your members want.

Action Item: You may wish to target these issues with your by committee brainstorming an action plan via a SWOT analysis.

BEFORE YOU CAN START THE YEAR YOU WILL NEED TO COMPLETE THE RENEWAL TASK.
Doing these tasks can give you a strong idea of what

Estimated Time: 10 minutes
Task Purpose
Your membership levels will all show on one webpage. We want you to provide an overview on the webpage to showcase:

- What the different membership types mean
- How to join

You do not want potential members to have to click through to every membership type individually to find more information before they decide to join your club. Give them the info up front.
A little effort to update your decription on the memberships web page will go a long way. We've included some example text beneath these task instructions, to help give you some ideas. Here's an example of what it could look like: https://csgtest.tidyhq.com/public/membership_levels

TidyHQ Renewal Membership Task Instructions

- In the Web Pages app (on the main left hand side menu):

- Find the "memberships" page and click "edit"
- Update/edit to add information about the benefit of joining your club, how to join, describe each membership type and provide details on how to pay using cash or club voucher in person. Below is some sample text you may wish to draw inspiration from.
- Once updated, we recommend viewing your web page in an incognito web browser page to check the customer's view (as this will be different to yours, as an admin).

Example text:
"Join the Curtin Putt Putt Club!
Interested in golf? But smaller? Curtin Putt Putt Club is for you. Our club hosts regular outings to local miniature golf centres to develop our putting skills, make new friends, and to have fun! Whether you are a casual player, brand new to golf, or looking to become a pro-putter, join us below!

- *Ordinary Membership (Curtin Students): In addition to being invited to all of our events, you can have have your say on how the club is run by voting at General Meetings and nominate for vacant positions on the committee.*
    - *Pay online: $6 (includes online booking fee). You'll immediately become a member.*
    - *Pay in person: $5. Want to pay using cash, a Guild club voucher or EFTPOS/ Pay-pass? Complete the EOI and pay $0 upfront now - your membership will be "pending" until payment is made. We'll meet you in person to collect payment and confirm your membership.*
- *Associate Membership (Non-Curtin Students) - $12 (includes online booking fee) to join as an associate member. This is for anyone who is not a Curtin student. Are you from another uni? Staff? Curtin College Students? Or just want to join us? You can enjoy the benefits of being a member of our club, attending our outings, but you are not able to vote nor sit on committee. (But that's okay - you'll still have a blast!)*

Want to join but pay with cash or use a club voucher?
Please register below and choose "pay-in-person" to find out where/when you can find us to finalise your membership.
What's a club voucher & where do I get one? Curtin-enrolled students can collect 2x $5 club vouchers from the Curtin Student Guild each year. To collect, visit a Guild membership booth during O-Week, or Guild Reception year-round (Building 106F, Bentley campus), with a copy of your Curtin Student ID."

✅ Submit this task for review

Estimated Time: 10 minutes

Task Purpose

We must now review all membership levels and update them to prepare for 2026 memberships.

REMINDER: Clubs must use TidyHQ to manage memberships to maintain Guild affiliation. Memberships cannot be processed through any other platform, application, or form.

Membership Types
Members should clearly understand their membership type (Ordinary or Associate) and what it means for their participation in club activities. Using terminology consistent with the club's governing documents ensures members are aware of their rights and eligibility.

Extract from 2024 Default Guild Club Constitution

5. **Membership**

5.1 Types of Membership

(a) Membership of the Society shall consist of Ordinary Members and Associate Members.

For more details, refer to the Default Guild Club Constitution here.

Membership Types

The following membership levels are required so that the Guild and your committee can identify who are Curtin Students and who are not.

- Ordinary Membership (Curtin Students)
  Membership Description: Ordinary Membership is for students enrolled at Curtin University who are over the age of 14 years.
  As an Ordinary Member, the constitutional benefits of membership also include the right to:
  - vote at any General Meeting of the Society;
  - be an Officer of the Society (provided they are over 18 & appointed via the process outlined within Governance documents).

- Associate Membership
  Membership Description: Associate Membership is for those who are not students at Curtin University such as Curtin staff, Curtin College Students, students from other universities or general public. As an Associate Member, you are not eligible to:
  - vote at any General Meeting of the Society;
  - be an Officer of the Society.

Task Instructions

Part 1

Help Video - Membership Types & Pricing

- Go to Memberships > Membership Levels, then review and update each level as required, as per the following instructions.
- Review Details
  - Review description & update if desired. Please see the membership types sample wording above (see "membership types").
- Review Pricing
  - Keep plan type set to fixed.
  - Length should be set to at least 12 months. To allow some overlap from one year into the next, add an additional couple of months (recommended).
  - Leave Start Date as is.
  - Check / set membership price. Note: if your charge a fee - ensure your Ordinary Member fee is set at least 10% less than your Associate Member fee. Consider rounding this up to the nearest dollar difference for ease (i.e. $6 for Curtin students, $7 for associates).
  - Consider adding an additional $1- $2 to all "pay online" membership levels to cover any fees associated with Stripe. $1 per year, for one individual student is minimal compared to a larger sum for your club to lose to payment gateway fees each year.

Part 2
Help Video - Membership Renewals & Registration Form

- Review Renewals
  - Tick "Allow Renewal"
  - Make sure "Auto-Renew" is *not* ticked.
- Review Registration Form
  - Under "Membership Field Options" >
  - Ensure "Require Agreement" is ticked.
  - If a waiver field does not automatically appear, you will need to click "Edit" next to "Require Agreement".
  - If you wish to make any edits to the default T&C's, or add anything extra (i.e. specific to your club), *please include the exact wording of the changes in the "discussion" tab* for this task and leave a message. for the organisers (Guild) to review and respond. This requires Guild approval prior to implementing.

Part 3
Help Video - Welcome Messaging & Notifications

- Review Member Messages
  - Under "Welcome", add or update your welcome message.
  - Update all other fields as desired.
- Review Admin Notifications
  - Add anyone from your committee who should receive a notification each time a new member joins, or an existing member renews.
- Review Access & Sharing
  - Under "Visible To" > Click "Public". The membership sign-up form will not display for prospective new members on your club webpage without this option ticked.
  - Under "Goes Public on" > leave blank so that it is live immediately for members to sign up or renew for 2026.
  - Under "Auto-add Member to Group" > Delete "2025 Members".
  - Under "Auto-add Member to Group" > add the following into the empty text field and select:
    - 2026 All Members
    - 2026 Ordinary Members (or Associate Members depending on the level you're updating).
    - If these groups do not show up this is because the first task (called BEFORE THE AGM) in this project has not been completed. You will need to create your 2026 contact groups Tip: When creating a group, always put the year first, this helps you find groups easier later.
      - Go to Contacts > Groups > New > Title 2026 Committee Nominations & EOIs > click save. NOTE: Do not populate from another group > click the dropdown "share with", select "Curtin Student Guild" > click "add" > click save.
      - Go back to Contacts > Groups > New and create the following additional new groups. do not populate from another group > click the dropdown "share with", select "Curtin Student Guild" for all of the following:
        - Title 2026 Committee
        - Title 2026 All Members
        - Title 2026 Ordinary Members
        - Title 2026 Associate Members

✅ Submit this task for review

Treasurer

Treasurer

Role Description

- The Treasurer oversees the club's finances, ensuring funds are managed responsibly and in accordance with university guidelines. The treasurer will also be responsible for strategic direction of the club's financial growth.

Expectations and Time Commitment Prepare and maintain the club's budget, tracking income and expenses.

- Ensure all financial transactions are accurately recorded and documented. Handle reimbursements and payments for events and activities.
- Work with the Vice President Events to create cost-effective event plans.
- Provide financial reports during meetings and upon request.
- Apply for funding opportunities and sponsorships to support the club, in collaboration with the President and Treasurer.

Weekly commitment: 7 hours

The links will work on the original document

01. Club Induction Course - Module 3 Finances

Guild Club Committee Induction Course

Module 3: Finance & Strategic Planning

Module 3: Finance & Strategic Planning

Strategic planning is where you define the association's purpose, vision, goals and objectives, while succession planning ensures that the leadership transition is smooth and seamless.

Financial management is not just the treasurer's job; the entire committee is accountable for the club's financial performance. This module explores the different types of financial documents with which you should be familiar, financial terminology, financial delegations, the roles of the treasurer and auditor and financial safeguards. Most importantly, you'll also learn how to ask good questions relating to financial management, to meet your duty of care and diligence to the club.
By the end of this module, you will have gained a deeper understanding of the important role that strategic planning, succession planning and financial management play in the long-term success of your club. You will be equipped with the knowledge and tools to effectively plan for the future, ensure continuity of leadership and safeguard the financial health of your club.

The objectives of this module are to help you:

- Understand the importance of strategic planning for the **long-term success** of your club
- Learn how to develop and **implement a strategic plan**
- Recognise the benefits of succession planning and how it can ensure continuity of leadership and institutional knowledge transfer
- Learn tips for **developing an effective succession plan** and creating a pipeline of future leaders
- Understand the role of **financial management** in the context of a committee member's duty of care and diligence
- Learn how to read and interpret financial statements and understand key financial terms and concepts
- Recognise the role of the treasurer and the Guild in financial management, and the importance of budgeting, financial safeguards and financial delegations.

Financial Management

As a committee member of your student association, you have a duty to act with care and diligence. This means conducting your own due diligence by asking questions and not just agreeing with anything presented to you in a committee meeting. Financial management is a critical area that requires your attention in the context of your duty of care and diligence.

Financial management is not just the job of the treasurer - the entire committee is accountable for the financial performance of your student association and every committee member should have a good understanding of how to read and interpret the club's finance reports.

(Financial Management Video)

Financial terminology

A good understanding of financial terminology is helpful for effective financial management in clubs. In addition to understanding financial reporting, here are some of the other key financial terms with which you should be familiar:

- **Australian Business Number (ABN):** An identifier for clubs conducting business in Australia
- **Goods and Services Tax (GST):** A tax applied to goods or services sold in Australia. Clubs are sub-entities of the Guild and as such, are **NOT** required to pay or register for GST with the Australian Taxation Office (ATO).
- **Income or Revenue:** The money a club earns through its operations, such as membership fees, event ticket sales, fundraising, food and drink sales and grants from the Guild or Sponsorship from affiliations.
- **Expenses or Expenditure:** The money a club spends running its operations, including event venue hire fees, equipment purchases, stock (such as food and drink for events), printing costs, and any subscription fees.

It's important that all members of the club's committee are familiar with these terms. This ensures that everyone is on the same page when discussing the club's finances.

The role of the treasurer

They are *responsible* for managing the club's financial affairs, including maintaining accurate financial records, ensuring compliance with legal requirements and preparing financial reports. The Treasurer must keep the club's record keeping software balanced and up-to-date monthly as per the Guild's instructions.

It is the committee however, that is ultimately responsible and accountable for:

- the club's financial performance, and every committee member must be involved in the financial decision-making process.

• obtaining receipts if purchasing items on behalf of the club at any

time. • Ensuring appropriate usage of the club’s funds.

The role of the Guild

The Guild reserves the right to audit or review club financial records at any time to ensure compliance and financial responsibility, and verify that transactions have been accurately reported (free of material misstatement).

The Guild shall have access to the financial records of the club via the provided financial management software.

A Financial Compliance Notice may be issued for clarification on expenditure if there is reasonable belief that the expenditure may not meet the aims of the club or has been deemed potentially irresponsible. Upon receipt of a Financial Compliance Notice, the club will have 7 days to respond.

Should the response be deemed unsatisfactory or insufficient, the Club Escalation Policy will be enacted, and the club must cease usage of the clubs funds whilst the matter is investigated, preventing transactions being made on the account(s) during this time.

Financial Safeguards & Delegations

It is crucial to go beyond meeting minimum standards in financial management and aim for best practice. This means following Guild policies and procedures, investing time into training committee members, and regularly reviewing the club's financial performance to identify areas for improvement.

Financial delegations refer to the authority granted to the committee to approve financial decisions or make payments up to a certain limit. It is important for the committee to clearly define these limits and ensure that they align with the club’s financial rules and objectives.

There are several **financial safeguards** that clubs must use to protect their funds against accidental loss and theft. Here are some financial safeguards that can help protect the association's funds.

Appropriate Use of Club Funds

Clubs are required to operate as not-for-profit associations. Whilst clubs are permitted to derive surpluses from their activities (i.e. membership fees, event ticket sales, merchandise sales, fundraising, etc.), these surpluses must be solely used to facilitate the objectives and purposes of the club. Club members and officers shall not derive any personal financial gain from the club’s activities.

All expenses must reasonably meet the aims and objectives of the club, as declared and approved in the club's application to register and/or renew with the Guild.

- All purchases and payments must be made with the highest level of financial discretion to protect and properly manage the club's money. This includes:
  - Using resources efficiently – i.e. finding the best value for money, avoiding unnecessary expenses, and ensuring assets are used effectively.
  - Meeting legal and contractual obligations with suppliers, sponsors, and stakeholders,
  - Strategic sourcing – i.e. identifying the best vendors / suppliers and seeking favourable terms and/or pricing to optimise value to members.
  - Demonstrating accountability and transparency to members in relation to how club funds are used.
  - Ensuring any conflicts are declared if one exists - e.g. the decision to purchase or engage the services of a supplier known to the member engaging them.
- Club funds in reserve at any time should be sufficient to cover unforeseen expenses and maintain operational continuity, without becoming excessive and potentially hindering a club's ability to fulfil its purpose. Clubs should allocate the majority of any surpluses that they generate toward achieving their objectives and delivering programs, events, and/or other initiatives that serve their members.

Record-keeping

All clubs must manage their finances within an online platform provided by the Guild. Currently, this is TidyHQ.

Clubs and their officers must ensure its financial activity throughout the year is correctly recorded in your TidyHQ finances module. Financial records must demonstrate appropriate use of funds and management of the club's finances and must align with the club's bank balance and transaction history.

Many clubs in the past have made the mistake of relying solely on transaction statements from banks or payment processors, but this approach is limited and can lead to serious issues over time. This is why the financial module in TidyHQ is compulsory to use to record and manage its finances. Before we explain how to use it, let's first understand why we need to.

This is also known as bookkeeping which is the process of recording and organising all financial transactions in a structured and consistent way. Its core purposes and the Guild's requirements include:

- **Maintain Accurate Financial Records**: Using the software provided by the Guild (TidyHQ) ensures every income, expense, asset, and liability is recorded and categorised correctly.
- **Accountability**: Provides transparency for members, committees, and stakeholders— everyone can see how funds are being used when reports are prepared and provided through the software.
- **Legal Compliance**: Supports reporting requirements for regulatory bodies including the Guild.

- **Better Decision-Making**: Allows clubs to track performance, manage budgets, and plan for the future with real data you can use to create financial reports for meetings.

Without proper bookkeeping, clubs risk financial mismanagement, missed reporting deadlines, and loss of member trust. Clubs should keep their books up-to-date and balanced monthly.

Use this video to get a summary of this

Equipment & Asset Tracking

Clubs should keep track of their assets and equipment. This template will assist you to track the location, number of items, value and condition of your belongings. For best practice, consider using an online google sheet so your committee can update it regularly - especially if you have a lot of event equipment that is constantly on the move.

You can find this in TidyHQ files storage

Financial Reporting

Financial reporting involves preparing financial reports. You can generate reports using the finance management system provided by the Guild however, the record-keeping must be up-to date for accuracy.

Financial Reports must be prepared and presented:

- To the committee at **committee meetings** to provide an overview of the financial health of the club. The committee will review them regularly to ensure that the club is on track.

- to their members at their **Annual General Meeting** each year, summarising the club's financial performance and position for the year. At a minimum, the report must include a financial statement showing income, expenses, and surplus/deficit; and a balance sheet showing assets (including club-owned equipment), liabilities and equity.

Budgeting

Budgeting is an important process that involves setting financial targets. It helps the committee allocate resources to meet the club's objectives. Regular budget vs. actuals reporting is essential to track the club's financial performance and identify any variances between the actual financial results and the budgeted targets.

Here are five tips to help create a successful budgeting process for clubs:

1. **Make it a collaborative process:** The budget should be developed through collaboration between the committee and relevant subcommittee members. This approach helps ensure that the budget is based on realistic assumptions and accounts for all expected sources of revenue and expenses.

2. **Set it early:** The budgeting process should have a clear timeline and should be completed well in advance of the start of the year. This allows time for the committee to make informed decisions and allocate resources effectively.
3. **Understand budgeting methods:** It is important to understand if the budget will be based on zero-based budgeting or last year's performance. Zero-based budgeting starts from scratch, requiring justification for all expenditure and every income item, while basing the budget on last year's performance means starting with the previous year's financial performance and making adjustments as necessary.
4. **Prioritise:** Budgeting requires making choices about how to allocate resources. It is important for the committee to prioritise the most important initiatives and ensure that the club's resources are directed towards achieving your strategic objectives.
5. **Monitor:** Regular monitoring of the budget against actual performance is key to identifying any issues or areas that require attention. This helps the committee to proactively manage the club's finances, make informed decisions and guide adjustments to operations as necessary. Scenario planning can be helpful to consider different possibilities such as significant decreases in revenue or unexpected expenses.

Approval of expenditure

All expenses incurred by the club must be approved or ratified by the committee, either before or after the expenditure is made. This helps to ensure that expenses are within budget and aligned with the club’s goals. Approval refers to the process of seeking approval for an expense before it is incurred, while ratification is the process of approving an expense after it has been incurred. For expenditure to be approved:

- It must be recorded in committee meeting minutes and/or circular resolutions.
- A club’s committee may authorise designated officers to expend funds on behalf of the club, up to a specified limit for a specified purpose. It is at the committee’s discretion to award either a total spend amount to various related purchases, or to allocate specific values to specific items. This should be recorded in meeting minutes and/or as a circular resolution, and must specify who has been given authorisation, for what purpose, and what spend limit has been set.
- Meeting minutes and/or circular resolutions in which expenditure approvals and other financial decisions are recorded must be stored within Tidy HQ, and readily accessible within the platform at any time. The minutes and/or circular resolution shall record:
  - The type of purchase or expense approved, and its purpose
  - Specific items approved (if applicable)
  - The amount budgeted and approved for expenditure
  - Where applicable, the name of the vendor or supplier to be utilised (if known)

- The committee member(s) authorised to make the relevant purchase(s) as determined by the committee
- Declaration that no known conflict exists with the committee.

Use the TidyHQ **Meetings** app for these meetings so that all minutes can be found in the one place:

- **Committee Meetings:** Clubs do not have to upload all committee meeting minutes to TidyHQ. However, it is highly recommended for good housekeeping in order to avoid lost data during handovers year-to-year and to make the most out of the inbuilt task assignment functionality. Regardless, you must still document your decisions in committee meeting minutes and save them somewhere accessible for your committee if not TidyHQ. You can find more details on how to run effective meetings in line with the club constitution and rules in Module 2.
- **General Meetings (AGM & SGMs):** Uploading meeting minutes to TidyHQ for these types of meetings is absolutely mandatory. For AGM's and SGM's you should:
  - **Use Templates:** Always consider using our templates for agendas, notice to members & meeting minutes.
  - **Manage attendees:** Send the official invite along with the meeting documents to members via email. Here is a help video that explains how to do this via the TidyHQ **meetings** app so that you can manage your attendees. Always cc clubs@guild.curtin.edu.au.

Bank Accounts & Debit Cards

Dual authorisation on bank accounts

If the club has a two-to-sign account, the bank accounts will require dual authorisation for any withdrawals or transfers. This means that two separate people must authorise the transaction, adding a layer of protection against fraud or theft.

Debit Cards

If the club has a one-to-sign account, the bank can issue a debit card. Any debit card(s) issued must meet the following additional requirements:

- A maximum of two nominated officers of the club shall hold a club debit card. If additional cardholders are required, the club must seek advance permission from the Guild.
- The club must maintain an up-to-date register of cards and cardholders within Tidy HQ at all times, including the date each card has been issued to, and returned by, each cardholder.
- Upon a cardholder vacating or being removed from their role as an officer of the club, and/or no longer being an enrolled Curtin student, they must surrender the card to the club President or Treasurer (or equivalent), or to the Guild directly, within 48 hours.
- Strictly no personal expenses shall be charged to the club debit card.

- All purchases made using the club debit card must adhere to all relevant financial management guidelines, including approval of expenditure..
- Cards are not transferrable or to be used by anyone other than the cardholder and it is the cardholder's responsibility to ensure that the card is securely stored when not in use.

Bank Account Signatories

All club bank accounts must have a minimum of two officers of the club assigned as signatories to the club bank account.

- The President and Treasurer (or equivalent) must both be signatories to the account.
- Any additional signatories may be allocated at the discretion of the club, with the provision that only current officers of the club may be added as signatories to the account, and no more than four officers of the club shall be signatories to the account in total.
- Only currently enrolled Curtin students are permitted to be signatories to a club bank account. Should a signatory's enrolment status change, rendering them no longer a current student, they must be replaced or removed as signatories on any club accounts they have access to, no later than 28 business days from when their enrolment lapses.

Electronic payments

Minimising cash handling reduces the risk of theft or loss. Where possible, the club should make and receive payments electronically, rather than using cash.

Cash

All cash handling should be supervised to prevent theft or mismanagement. If cash is accepted at any events, it should be counted and recorded by at least <u>two people</u> to ensure accuracy.

- **Petty Cash:** If required, clubs can withdraw petty cash up to a sum of $200.
  - It must be stored securely by the treasurer and easily accessible when needed. It whereabouts and contents should always be known.
  - Any petty cash or other club funds (i.e. bank cheques) should have been entered as expenses into the Finances app when originally withdrawn. (Note: these will need to be entered as deposits once returned to your club bank account.)
- **Cash Received:**
  - If cash is accepted at any events, it should be counted and recorded by at least <u>two people</u> to ensure accuracy.
  - Except for the purpose of maintaining a minor petty cash reserve if required, any cash payments a club receives must be deposited into the club's primary bank account within no less than 5 business days of being received and entered as income in the finance app.
  - The club must establish a system for recording incoming and outgoings of petty cash.

Speak up & Discuss Concerns

If anyone on the committee or within the association notices something that seems unusual or suspicious, they should speak up as soon as possible. Reporting concerns early can help prevent small issues from turning into larger problems.

By implementing these financial safeguards, clubs can help protect their funds and ensure that they are used for the benefit of the association and its members.

Finally, and most importantly, asking good questions is a critical part of every committee member's role in financial management. It is essential to ask questions that challenge assumptions, clarify information and promote transparency. Good questions can help the committee identify potential risks and opportunities and make informed financial decisions. When it comes to financial management and protecting the funds of your club, the old saying is true: "The only silly question is the one you don't ask". As a committee member, it is your responsibility to understand the financial reports, ask good questions and guide the implementation of financial safeguards and best practices to protect your club's financial health.

Reconciling Accounts

The Club Treasurer (or equivalent) is required to **reconcile all transactions** within the software provided on a **monthly basis**. This section (reconciling accounts) is specifically for the Treasurer and the President. If any committee members temporarily fill the role of the treasurer during any absences, please direct them to complete this section of the training module.

All reconciled expenditure requires proof of expenditure attached, in the form of a receipt, tax invoice, or other formal documentation. So what do you need to help you reconcile your accounts?

Collect Bank Statements & Transaction History

The Process: Collect & download all bank statements showing the full transaction history of your club's bank account.

- If a statement is not ready and the month has concluded, you can download the transaction history report via your online banking login.
- Rename each statement to "[start date] to [end date]" as outlined in the period the statement is for (note that you cannot rename files once uploaded to TidyHQ. • Save all bank statements and transaction documents in TidyHQ via Storage > Bank Statements.

Help Video - Uploading Statements

Balance Books

"Balancing the books" means making sure your records of money coming in and going out match up exactly with what *actually* happened. This ensures that your financial information is accurate and complete. You're basically double-checking that:

• every dollar you earned or spent is recorded correctly.

• The ending balance in your books matches the real amount of money you have (in the bank, cash, etc.).

Why can't you just use a bank statement?
A bank statement shows *only* what went in and out of your bank account.

But: 1. **Timing differences**

Some transactions may not have cleared the bank yet. For example:

- You wrote a check, but the person hasn't deposited it yet.
- A payment is coming in, but hasn't hit your account yet.

2. **Non-bank transactions**

Some things affect your books but won't show on a bank statement:

- Petty cash purchases
- Depreciation (how assets lose value over time)
- Invoices sent but not paid yet (accounts receivable)
- Bills you owe but haven't paid yet (accounts payable)

3. **Errors or missing info**

- You might have recorded a transaction wrong in your books.
- The bank might have made an error.
- A transaction might be missing from your books entirely.
- Proof of purchases such as receipts, paid invoices are required for all expenses for auditing purposed. The bank statement isn't proof and you need receipts to accompany your transactions when entering into your bookkeeping software (TidyHQ).

Your books are your *detailed diary* of all money activity, including things not visible to the bank. The bank statement is like a *summary* from the bank's perspective. You need both to make sure everything lines up — that's balancing the books.

The Process: You must enter all income and expenses into TidyHQ.

Please keep this updated monthly.

Below are some help videos and written instructions.

Help Video - Stripe, Deposits & Income Check
Help Video - Missing transactions and Receipts
Help Video - Checking and Editing Transactions.

1. **How to enter all income and expenses into TidyHQ:** Open the TidyHQ Finances app and always check what's been entered so far. You can also check or update what invoices are awaiting payment or have been paid. Go to the Finances App > Transactions > Set date range from required. This will bring up all income and expenses that were conducted through Tidy HQ, or manually recorded in Tidy HQ by your Treasurer, for all of the year (through to now).
   - The cash from any **in-platform** transactions will show as Stripe deposits in your bank statements. Please do NOT manually enter Stripe payments shown

on your bank statement as deposits within Tidy HQ. These are already accounted for within the Finance app, and already shown in your transaction history (as individual payments).

- You will however need to check any **off-platform** expenses and deposits (i.e. those showing as anything other than "Stripe" under the "Type" column) and match this to what is shown in your bank statements. Specifically, this will involve:
  - Adding any missing deposits and expenses throughout the year. This can be done one by one, or in bulk, but must match your bank history overall. Further instructions below.
  - Updating descriptions for clarity (if needed),
  - Correcting any data entry errors (amounts, dates, etc.). Include a note if doing so to say why you have made a change & what the change is.
  - Further info and instructions are provided below.

2. **How to bulk-add multiple missing expenses across a given month (or other timeframe):**

- Hover your mouse over Finances > click New Expense.
- "To" section can be left blank
- Set the date to the last date of the month / time period being entered • Under "Reference" write "Expenses [Month / Time Period Start Date to Finish Date]" *e.g. "Expenses August" or "Expenses 1 Apr - 30 Sept"*
- Set "Status" as "Paid"
- Add line items showing a consolidated total for each expense category. Update the description for each line item to say what the broad expense category covers, and update the amount to the total amount spent on this category over the nominated time period. *e.g. Line Item 1: "Ball expenses" $3026.00, Line Item 2: "O-Day stall supplies" $324.00, Line tem 3: "Meeting catering" $54.00".*
- Click Complete.
- Repeat for additional months / time periods as required.

3. **How to add missing expenses one at a time:**

- Hover your mouse over Finances > click New Expense:
- "To" section can be left blank
- Update to match the date of the actual bank transaction
- Under "Reference", copy/paste bank transaction details.
- Set "Status" as "Paid".
- Add line item description (click the field under "description") to include further details on what the expense was for, set the amount, and allocate to the relevant finance category.
- Click Complete.

- Repeat for additional expenses as required.

4. **How to bulk-add multiple missing deposits/income across a given month (or other timeframe):**
   - Hover your mouse over Finances > click New Deposit.
   - "Pick a contact" section can be left blank
   - Set the date to the last date of that month
   - Under "Reference" write "Income [Month / Time Period Start Date to Finish Date]" e.g. "Income August 2024" or "Income 2 Aug - 30 Sep"
   - Set "Payment Type" as "Bank"
   - Leave "Transaction Reference" blank.
   - Add line items showing a consolidated total for each category. Update the description for each line item to say what the broad finance category covers, and update the amount to the total income received in this category over the nominated time period. e.g. Line Item 1: "Ball ticket sales" $2840.00, Line item 2: "Guild Event Grant" $400.
   - Repeat for additional months / time periods as required.

5. **How to add missing deposits/income one at a time:**
   - Hover your mouse over Finances > click New Deposit.

"Pick a contact" section can be left blank

   - Set the date to the actual date the deposit hit the bank
   - Under "Reference," write what the payment was for.
   - Set "Payment Type" as "Bank"
   - Leave "Transaction Reference" blank.
   - Add line item description (click the field under "description") to include further details on what the income was for, set the amount, and allocate to the relevant finance category.
   - Repeat for additional months / time periods as required.

6. **How to edit an existing transaction:**
   - Expenses
     - To the right hand side of the transaction, click the drop-down settings cog icon, then click "View Expense".
     - Expenses can not be edited once marked "paid". If updates are required, please add notes wherever possible. (i.e. to add detail, correct dates, etc.)
     - Click "Add Note" > add your notes > Click Add.
     - If the amount or finance category is incorrect, you will need to "delete" the entry and re-enter with the correct info. Please only delete expenses if absolutely necessary.

- Deposits
  - To the right hand side of the transaction, click the drop-down settings cog icon, then click "View Deposit".
  - To edit (i.e. update amount, date, finance category, or provide further detail), click "edit" in the top right corner to make any required changes.
  - Please also use the "notes" feature to note that an edit has been made, and why. ○ If the entire entry is incorrect, you may delete using the "delete" feature. Please only delete if absolutely necessary (i.e. a duplicate entry).

7. **How to Check Final Balance & Generate Financial Summary**

- Once you have checked and updated your off-platform transactions (as above), take a quick look at payments taken directly through Tidy HQ.
- In-platform transactions should not require any further action or edits, unless these were not set up correctly at the time. Take the time to take a quick look at a few to ensure these have been assigned to the correct finance category, and that descriptions are clear.
- These will be automatically reported within their relevant income/expense categories for the year.
- Go back to the Overview tab, and see whether the net cash position amount matches your current bank balance.
- If it does not, you will need to troubleshoot why this is the case. Re-check each of the items above to make sure all expenses and deposits have been entered (s per your bank records), and that all amounts are correct.
- If you are still unable to determine why your Tidy HQ balance and bank balance do not align, please comment in the Discussion tab for this task, and we will reach out to provide further support / advice.
- Once you have completed all of the above steps, and have balanced your net cash position to your current bank balance, you can now view your club's overall financial position for the year.
- Go to Finances > Reports to view your full club financial summary for the year. Make sure the period is set to "This Financial Year" (if completing this task in 2024) or "Last Financial Year" (if completing this task in 2024), using the drop down menu in the top right corner.
- Your Cash Flow report now provides a full break down of all 2024 expenses & income by category, and also shows your net cash position. This can be printed, exported to CSV for any more detailed reporting you wish to run, and shared with your members (i.e. at your AGM and/or in your Annual Report, if you have one).

Marketing VP

Marketing VP

Role Description

- The Vice President Marketing is responsible for the strategic direction in promoting the club's activities, maintaining its public image, and ensuring effective communication with members and external audiences.

Expectations and Time Commitment

- Develop and implement marketing strategies to attract new members and engage current members.
- Manage the club's social media platforms. Create promotional materials such as posters, flyers, and digital content.
- Collaborate with the Vice President Events and aps student rep to advertise events effectively.
- Maintain a consistent brand identity for the club. Track and analyse engagement metrics to improve outreach efforts. leading marketing officers to achieve goals.

Weekly commitment: 7 hours

Brand Package can be found in the TidyHQ files under Marketing

Go through Meta and review Setting of access to social media pages - The Facebook is not an independent account, it is a page. Meaning if you assign people to it they can 'Post as Curtin Psychology Society'. To access this, you need to log in to Meta via Instagram.

Estimated Time: 5 - 30 minutes

Task Purpose

Your club listing on the Guild website links directly to your TidyHQ Web Page, making this the first point-of-call for students looking to join your club.

Clubs receive significantly more interest on the Guild website than any other service the Guild provides. An informative club web page will secure you more members, so a little effort to update your web page will go a long way. We've included a few examples from other clubs beneath these task instructions, to help give you some ideas.

TidyHQ Renewal Update Website Task Instructions

Help Video - Updating settings
Update your TidyHQ web page and check/edit your account settings by following these steps:

- Go to Organisation Settings and double check all settings, in particular:
    - Organisation Details - check the data in each field, on each tab. Update where needed however, Do NOT change the Memberships agreement text / T&C's.
    - Web Page settings
        - Contact Us page must be enabled
        - Contact email should be displayed
        - Ensure the Safe Spaces Agreement info and link remains published.
        - Check and update all other data in each field, on each tab (as/if needed).
    - Memberships settings
        - Do NOT change the agreement text / T&C's.
        - If you wish to make any edits to the default T&C's, or add anything extra (i.e. specific to your club), *please include the exact wording of the changes in the "discussion" tab* for this task and leave a message. for the organisers (Guild) to review and respond. This requires Guild approval prior to implementing.
- In the Web Pages app (back on the main left hand side menu):
    - Check the description and settings on each page (DO NOT EDIT THE GOVERNANCE PAGES).
    - Update/edit if desired.
    - Add new pages if you wish.
- Once updated, we recommend viewing your web page in an incognito web browser page to check the customer's view (as this will be different to yours, as an admin).

Help Link: https://support.tidyhq.com/en/collections/3020721-web-pages

Examples / Set-Up Ideas:

Help Video - A tour of the below club websites we think have done a great job at showcasing their club. If you'd prefer to look at their websites directly, click the links below.
https://sas.tidyhq.com/
https://curtin-aces.tidyhq.com/
https://curtin-ams.tidyhq.com/
https://curtin-bsc.tidyhq.com/
https://curtinafricanstudents.tidyhq.com/
https://cams.tidyhq.com/
https://curtin-divers.tidyhq.com/
https://curtin-esports.tidyhq.com/
https://curtin-gdc.tidyhq.com/
https://curtin-cilc.tidyhq.com/
https://curtin-cjc.tidyhq.com/
https://curtinquantsociety.tidyhq.com/
https://croc.tidyhq.com/
https://curtin-nadsa.tidyhq.com/

Events VP

Events VP

Role Description

- The Vice President Events is responsible for the strategic direction in organisation of all club events, ensuring they are engaging, inclusive, and align with the club's objectives.

Expectations and Time Commitment Plan

- coordinate, and execute a variety of events
- Work closely with the Treasurer to develop event budgets and ensure cost-effectiveness.
- Liaise with speakers, venues, and other stakeholders to organise logistics. Ensure events are accessible and promote inclusivity.
- Gather feedback from attendees to improve future events.
- Collaborate with the Vice President Marketing to promote events.
- Leading events officers to achieve goals.

Weekly commitment: 7 hours

How to run an event with the Student Guild: **2. Event Management**

In charge of keeping inventory current and up to date - storage access will need to be passed on. Email club support to start this process.

Equipment Tracking Asset can be accessed through here or through TidyHQ files.

Curtin-Psychology-Society-Equipment-Asset-Tracking.xlsx

Event Coordination - Schedule Templates for events are in the Event Management tab in the Tidy HQ Files, familiarise yourself with this as it should be shared with your team to ensure ease.

CPS Runsheet & Staff Rosters TEMPLATE

Handover Checklist

Handover Checklist

An official handover between the outgoing and incoming committee should be arranged.

With a new committee elected at your AGM, it's crucial for the outgoing team to share their knowledge and experience before stepping down.

A proper handover will help the new committee maintain the club's success without having to start from scratch. It's also a chance to learn from past experiences and prepare for the future.

Handover Tips

Schedule in-person or online meetings to discuss each role, allowing plenty of time for questions—don't try to fit everything into a short session.

- **Prepare** a detailed handover document to serve as a guide for the new team when needed. Consider what you wish you had known when you started and share that insight. If you already have a handover guide of your own, update it regularly and ensure there is no outdated advice that conflicts with the Guild processes for clubs.
    - Create a private/locked document or use an app to list all platforms the club uses and include login details, links, usernames and passwords.
- **Meet** as a whole committee and 1:1 between outgoing and incoming members in similar roles.
    - Encourage team bonding with activities or socials during the handover to build good working relationships.
    - If time permits, consider giving the new committee a chance to get firsthand experience by allowing them to shadow outgoing members during activities such as:
        - final meetings
        - submitting Guild applications for grants, events or other processes.
        - delivering your final events
        - updating TidyHQ
        - meeting sponsors or other stakeholders
        - to get firsthand experience.

Handover Checklist

- [x] ~~Update Committee Role Descriptions.~~
- [x] ~~Update 2025 committee contacts (follow instructions in the TidyHQ 2025 AGM project task).~~
- [ ] Update & share the club asset registry list. Outline where all equipment is located/stored.

- Waiting on information from past committee members in terms of the asset registry (all products were brought under their committee). Equipment is currently all stored in Guild storage.

- [x] ~~Prepare a detailed handover document.~~
  - [x] ~~Prepare role specific handover documents.~~
  - [x] ~~Organise handover meetings.~~
  - [x] ~~Establish communication process (i.e. WhatsApp group) between outgoing and incoming committee. Be available for questions at least until the club has completed their 2025 Guild Renewal.~~
  - [x] ~~Organise handover meetings.~~
- [x] ~~Provide admin access to:~~
  - [x] ~~TidyHQ~~
  - [x] ~~Social Media Accounts~~
  - [x] ~~Online banking~~
  - [x] ~~Email accounts (all exec committees should have access to the clubs central email).~~
  - [x] ~~Other platform logins.~~
- [x] ~~Update contact details on Stripe (if you are using it).~~ ~~**This is really important.**~~
- [x] ~~Outline the Guild processes for clubs (see club registration info here).~~
  - [x] ~~Outline that the club must renew annually by completing a project in TidyHQ. This will be released 15 October & deadline to complete is 15 Feb.~~
- [x] ~~Discuss the legal and compliance obligations of running the club.~~
- [x] ~~Provide an overview of TidyHQ and outline the apps that are mandatory to use.~~
- [x] ~~Arrange a meeting with the bank and change signatories.~~
- [x] ~~Share useful contacts (Guild, Uni, sponsors etc.)~~
- [x] ~~Discuss partnerships & sponsorship agreements that you may have in place.~~
- [x] ~~Provide overview on how to run meetings using these Guild resources.~~
- [x] ~~Discuss what you have learned during the time on committee and provide advice/feedback by completing a SWOT analysis within the handover meeting to cover:~~
  - [x] ~~What you wish you knew~~
  - [x] ~~Ideas for changes~~
  - [x] ~~Identifying issues and potential resolutions to meet goals~~