United Kingdom and Eire Council for Malaysian Students

Majlis Perwakilan Pelajar Malaysia di United Kingdom dan Eire

Patron Y.Bhg Dato' Sri Mustapa Mohamed

MSoc Finance Playbook

Prepared by:

Basyirah Binti Umu Aiman

Assistant National Treasurer of UKEC 2025/2026

2nd Year, BA(Econ) Accounting and Finance

The University of Manchester

Approved by:

Tang Kai Ying

National Treasurer of UKEC 2025/2026

2nd Year, BSc Financial Economics with Actuarial

The University of Leeds

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1.0 Introduction

1.1 Why financial management matters in student societies

Financial management is the backbone of any successful student society. While the core focus of a society is the mission (whether that's academic, cultural, or social), capital is the fuel that allows a society to execute that mission effectively. Poor financial practices, even unintentional ones, can lead to serious consequences, not just for the committee but for the society's long-term existence.

1.2 Common challenges

Student societies operate in a unique environment, often facing specific financial obstacles such as:

a. *High Turnove*r: The annual change in committee members means there is a constant risk of losing crucial historical financial knowledge and expertise.
b. *Unrealistic Budgeting:* New committees, excited about the year ahead, often overestimate income (e.g., membership sales) or underestimate expenses (e.g., catering, venue deposits), leading to deficits.
c. *Inconsistent Record Keeping:* Relying on physical receipts or personal accounts leads to disorganised records, making audits difficult and transition to the next Treasurer nearly impossible.
d. *Cash Flow Gaps:* Funds are often received in large amounts (e.g., annual grants or large event ticket sales) but need to cover ongoing, smaller expenses, leading to periods where the account appears empty.
e. *Compliance Errors*: Failing to follow institutional rules on procurement, signing contracts, or reporting can result in fines or the temporary freezing of the society's accounts.

1.3 How this playbook will help

The MSoc Finance playbook will act as a financial guide while also giving you the tools, templates, and best practices to manage society finances with confidence. From budgeting and tracking to sponsorship and fundraising, you will find ready-to-use resources that can save time and reduce mistakes.

1.4 Disclaimer

This Financial Guidebook contains operational and procedural advice based on the best practices of UKEC and general accounting principles. This document is intended to be used alongside, and does not supersede, the official financial policies, regulations, and guidelines set forth by your University/ Student Union.

If there is ever a conflict between this internal guide and an official institution policy, the official policy must be followed.

2.0 Budgeting

2.1 What is an Annual Budget

An Annual Budget is a comprehensive financial plan that projects an organisation's expected revenues (income) and expenditures (expenses) over a specific 12-month period, often aligned with a fiscal or calendar year.

In essence, it serves as a financial roadmap or a detailed blueprint for the year, dictating how the society plans to raise money and how those funds will be allocated to achieve its goals and fulfill its mission.

Your annual budget should cover all society activities, including

a. Events (e.g. welcome week, flagship events, trips).
b. Operations (e.g. admin fees, printing, software subscriptions).
c. Marketing (e.g. posters, social media ads, merchandise).
d. Travel (e.g. guest speakers, society trips).
e. Contingency fund (for emergencies).

2.2 Step-by-Step Guide

<table>
<tr><th>Steps</th><th>Description</th></tr>
<tr><td>Step 1: Gather Financial Data</td><td>The first and most critical step is to understand your starting position.
<table>
<tr><th>Steps</th><th>Description</th></tr>
<tr><td>Step 1: Review Past Records</td><td>Collect all financial statements from the previous year, including bank statements, invoices, receipts, and any previous budget documents. This helps establish a baseline for income and expenditure.</td></tr>
<tr><td>Step 2: Identify Income Source</td><td>Clearly list all ways the society generates money.
a. Membership Fees: Note different tiers (e.g., standard/ subsidised/ discounted).
b. Ticket Sales/Event Revenue: Estimate based on historical attendance and pricing.
c. Sponsorships/Grants: Document confirmed or highly likely incoming funds.
d. University/Union Allocations: Note the fixed amount and release schedule</td></tr>
<tr><td>Step 3: Analyse Fixed vs. Variable Costs</td><td>Categorise all expenses from the previous year.
a. Fixed Costs: Expenses that are the same each month/year (e.g., website hosting, annual insurance, mandatory university fees).
b. Variable Costs: Expenses that change based on activity (e.g., catering for events, materials for workshops, marketing prints).</td></tr>
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<table>
<tr>
<td>Step 2: Estimate and Project Income</td>
<td>Based on your financial data, make realistic projections for the upcoming period.
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>Step 1: Set Membership Targets</td><td>Base this on historical membership numbers and any planned recruitment drives. Be conservative to avoid overestimating.
➢ Calculation Example: (Target Members × Fee) + (Target Renewals × Fee) = Projected Membership Income.</td></tr>
<tr><td>Step 2: Project Event Revenue</td><td>Estimate attendance for major events, considering ticket price. Factor in no-show rates and potential cancellations.</td></tr>
<tr><td>Step 3: Confirm External Funding</td><td>Only include sponsorships or grants that have been formally confirmed in writing. Do not budget based on "hopeful" funding.</td></tr>
<tr><td>Step 4: Total Projected Income</td><td>Sum all conservative estimates to get your absolute maximum working budget.</td></tr>
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<tr>
<td>Step 3: Determine and Allocate Expense</td>
<td>This is where you plan where your money will go, ensuring every activity has a corresponding budget line.
<table>
<tr><th>Steps</th><th>Description</th></tr>
<tr><td>Sep 1: List All Necessary Operating Costs (Fixed)</td><td>Administration (e.g., domain renewal, software subscriptions).
Mandatory Fees (e.g., Union affiliation, insurance).</td></tr>
<tr><td>Step 2: Budget for Core Activities (Variable)</td><td>Allocate funds based on the society's yearly plan (e.g., three main social events, six workshops, one annual trip).</td></tr>
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<td></td>
<td>Be Specific: Don't just budget for "Social Events." Budget for "Welcome Mixer Catering," "Quiz Night Venue Hire," etc.
Get Quotes: Where possible, get current quotes for venues, materials, or services to ensure accuracy.</td>
</tr>
<tr>
<td>Step 3: Create a Contingency Fund</td>
<td>Allocate 5% to 10% of your total projected income to an "Emergency/Contingency" fund. This is crucial for unexpected costs, such as a sudden rise in venue prices or a necessary repair. This money should not be spent unless absolutely necessary and with committee approval.</td>
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<tr>
<td>Step 4: Draft and Balance the Budget</td>
<td>Use a spreadsheet program (like Excel or Google Sheets) to formalise your budget.
<table>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
<tr>
<td>Step 1: Use a Zero-Based Budgeting Approach</td>
<td>Ideally, Projected Income - Total Expenses - Contingency Fund ≈$0. This means every dollar is assigned a purpose.
a. If Projected Income > Total Expenses: Increase your contingency fund or plan for a large-scale project/reserve fund for the following year. Do not overspend just to hit zero.
b. If Total Expenses > Projected Income (A Deficit): Review your variable costs immediately. Cut non-essential spending or look for new, realistic income streams (e.g., slightly higher membership fees,</td>
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<tr><td></td><td>more aggressive sponsorship search)</td></tr>
<tr><td>Step 2: Organise by Category</td><td>Group expenses logically (e.g., Events, Marketing, Administration, Equipment).</td></tr>
<tr><td>Step 3: Assign Tracking Codes (Optional but Recommended):</td><td>Assign a unique code (e.g., EVE001, MKT002) to each budget line item. This makes tracking actual spending throughout the year much easier.</td></tr>
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<tr>
<td>Step 5: Review, Approve, and Document</td>
<td>Finalise the budget through internal approval processes.
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>Step 1: Committee Review</td><td>The entire committee (especially the Treasurer and President) must review and agree on the budget's feasibility and allocations.</td></tr>
<tr><td>Step 2: University/ Union Review</td><td>Submit the finalised budget to the relevant student union or university body for formal approval, if this is a prerequisite for receiving funds.</td></tr>
<tr><td>Step 3: Document Everything</td><td>Save the final approved budget file in a secure, accessible location (e.g., cloud storage). Create a Budget Summary Document highlighting the main income sources and expenditure categories for quick reference.</td></tr>
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</tr>
<tr>
<td>Step 6: Implement and Monitor (An Ongoing Process)</td>
<td>A budget is a living document; it requires continuous monitoring.
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>Step 1: Implement Tracking</td><td>Throughout the year, rigorously track Actual Income and Actual Expenditure against the Budgeted Amounts using your spreadsheet.</td></tr>
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	a. Tip: Create a column for "Actual" next to "Budgeted" for every line item.
Step 2: Regular Reporting	The Treasurer should provide a concise financial report at least monthly to the executive committee, highlighting the 'variance' (the difference between Actual and Budgeted). a. Focus on Variances: Investigate any large positive (under-budget) or negative (over-budget) variances. If a category is consistently over-budget, the committee may need to vote to reallocate funds from the contingency or an under-spent category.
Step 3: Maintain Digital Records	Scan and digitally file all receipts and invoices immediately, linking them to their corresponding budget code. This ensures a clean audit trail for your successor.

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3.0 Expense Tracking & Transparency

3.1 Why expense tracking is important

Expense tracking is the process of systematically recording, classifying, and reviewing every single dollar the society spends. It is the core financial discipline that turns your theoretical budget into a functional, accountable reality.

3.2 Best Practices

Adopting these practices ensures your expense tracking system is robust, easy to maintain, and transferable to the next committee.

1. Internal Control & Documentation
    a. Separate Duties: The person who authorises an expense cannot be the same person who processes the payment (reimbursement). This prevents fraud. (e.g., The President approves, the Treasurer pays).
    b. The "No Receipt, No Reimbursement" Policy: This rule must be absolute. Without a valid receipt, the expense cannot be recorded and cannot be reimbursed. No exceptions.
    c. Digital Storage: Scan or take photos of all receipts immediately. Store all expense claim forms, receipts, and supporting documents in a centralised, shared cloud folder (e.g., Google Drive, OneDrive) organized by date and category.
2. Tool Usage and Timing
    a. Master Ledger: Use a shared spreadsheet (e.g., Google Sheets or Excel) as the single source of truth for all financial transactions. The columns must include: *Date, Description, Budget Category, Budgeted Amount, Actual Amount, Variance, Receipt ID/Status.*
    b. Weekly Check-In: The Treasurer should dedicate time at least once per week to review the bank statement, enter new expenses, and process any reimbursements. Delaying this leads to possible risks.
    c. Use Society Accounts: Whenever possible, use the society's official debit/credit card or direct bank transfer. This minimises reimbursements, reduces cash handling, and simplifies bank reconciliation.

3. Categorisation and Review
    a. Consistent Categorisation: Always record the expense using the exact category name from your Annual Budget (e.g., *Marketing_Freshers Fair*, *Operations_Website Host*)
    b. Monthly Review: At the end of each month, compare the *Actual Spending* for each category against the *Budgeted Amount* for that category. Any significant difference (variance) must be investigated, explained, and reported to the executive committee.

3.3 Step-by-Step Guide

The following five steps must be applied to every expense, regardless of size, use, or amount.

<table>
<tr><th>Steps</th><th>Description</th></tr>
<tr><td>Step 1:
Pre-Approved</td><td>Before any purchase is made, the spending member must receive verbal or written approval from the Treasurer or President.

❖ Note: Confirm the expense is necessary and is within the approved budget line</td></tr>
<tr><td>Step 2:
Purchase and Document</td><td>The member makes the purchase and immediately secures the proof of purchase

❖ Note: Obtain an original, itemized receipt/ invoice that clearly shows the vendor, date, and amount</td></tr>
<tr><td>Step 3:
Complete Claim form</td><td>The member fills out an Expense Claim Form (digital or physical). This form includes the spender's name, the date, the amount, and, crucially, the business purpose (e.g., "Catering for Welcome Mixer, 9/15").</td></tr>
<tr><td>Step 4: Review and Record</td><td>The Treasurer reviews the claim to ensure it is within policy, has the necessary receipt, and matches a budget line item. The expense is then recorded in the master ledger/spreadsheet.

❖ Note: The expense is coded with the correct budget category and a unique entry ID</td></tr>
<tr><td>Step 5:
Reimburse/
File Claim</td><td>Once recorded, the expense is either:
a. Filed (if paid with the society's card/account) or
b. Paid back to the member (reimbursed).</td></tr>
</table>

4.0 Sponsorships & Partnerships Toolkit

This section was prepared in collaboration with the Careers Office and developed by Amirul Haikal bin Mohd Yazid and Vice-Chairperson of Careers Office 25/26, Alya Sabrina binti Muhammad Ilmami.

4.1 Why sponsors partner with student societies

Sponsors don't support student societies out of "charity" alone – they do it because it helps them achieve real business and talent goals. Understanding **why** they partner with you makes it much easier to design proposals that speak their language.

In general, companies sponsor MSocs because they want to:

a. Build brand awareness with a targeted audience

- Student societies give companies direct access to a **specific, high-value demographic** (Malaysian, degree-specific, or skills-focused students).
- Events, banners, social media posts, and slides all help them **stay top-of-mind** when students are choosing internships, graduate schemes, or products.

b. Support recruitment and early-talent pipelines

- Many sponsors see MSocs as a potential **talent pipeline for future hires**.
- Career events, CV drops, coffee chats, and case workshops all help them **spot strong candidates early**.
- Societies give them access to students who are already **engaged, organised, and proactive** – qualities they want in graduate hires.

c. Deliver their CSR and education/outreach goals

- Some companies have **corporate social responsibility (CSR)** or education/outreach mandates (e.g., financial literacy, digital skills, employability).
- Partnering with MSocs allows them to **run workshops, mentoring, and talks** that meet these goals while genuinely benefiting students.

Do refer to the UKEC Stakeholder 101 for more information. In a situation where a Malaysian Society requires a better understanding of how to approach a sponsor, the representative can reach out to the UKEC team.

4.2 Best Practice

- Approach sponsors 3–4 months before the event.
- Tailor the proposal to each company's objectives.
- Always communicate value in terms of student reach, branding, and recruitment pipeline.

4.3 Step-by-Step Guide to Approaching Sponsors

Steps	Description
Step 1: Research and Targeting	• Identify industries that align with your event's theme and student audience (e.g., finance, consulting, tech, FMCG). • Understand each company's CSR or graduate recruitment priorities. • Research previous sponsorships the company has given to student groups or youth organisations.
Step 2: Identify the Right Contact Person	• Typically CSR Managers, Employer Branding Managers, University Recruitment, or HR. • LinkedIn is your best tool; look for "Campus Recruiter," "Graduate Talent Manager," or "CSR Manager." • If uncertain, start with the corporate communications team.
Step 3: Prepare Materials	• Sponsorship Proposal/Deck. • Budget/Financial breakdown. Track record (photos, testimonials, social media reach, previous sponsors)

Step 4: First Contact	• Start with a concise email + attached proposal. • Personalise it: highlight why their company is a fit. • Offer to schedule a call/meeting. • Do create a simple Customer Relationship Management ("CRM") to track your first contact meetings, and contacts.
Step 5: Follow-up	• Send a reminder email after 7 days if no response. • Call their office or follow up via LinkedIn after 2 weeks. • Keep communication professional and polite.
Step 6: Negotiate	• Be flexible with amounts — offer tier options (Gold/Silver/Bronze). • Consider in-kind contributions (venues, printing, merchandise). • Ensure everything is confirmed in writing (contract or email agreement).

4.4 Email Templates for Sponsorship Requests and Follow-Ups

Templates include:

A. Approach Email
B. Follow up Email
C. Thank you Email

A. Approach Email

Subject: Partnership Opportunity with [Your Society] – [Event Name] Dear [Name], I hope this email finds you well. I am [Your Name], [Position] of [Society/Organisation]. We are organising [Event Name], taking place on [Date], which will bring together [number of students, type of audience]. We believe [Company Name]'s commitment to [insert company values/CSR/recruitment] aligns closely with our mission to [insert event impact]. As such, we would like to invite [Company Name] to explore sponsorship opportunities with us. Please find attached our Sponsorship Proposal, which details the event, expected reach, and tailored partnership benefits. I would be delighted to arrange a call to discuss how we can create a meaningful collaboration. Thank you for your consideration. I look forward to hearing from you. Warm regards, [Your Name] [Position, Contact Details]

B. Follow-up Email

Subject: Gentle Follow-Up: Sponsorship Opportunity with [Event Name]

Dear [Name],

I hope you are doing well. I am following up on my earlier email regarding [Event Name], which will bring together [student audience description]. We would be grateful for the opportunity to discuss how [Company Name] could be a partner for this initiative.

Would you be available for a brief call next week to explore this further?

Thank you again for your time and consideration.

Warm regards,

[Your Name]

C. Thank you Email

Subject: Thank You for Supporting [Event Name]

Dear [Name],

On behalf of [Society], I would like to sincerely thank you and [Company Name] for sponsoring [Event Name]. Your support enabled us to [insert outcome: number of students reached, opportunities created].

We have attached a post-event report highlighting your brand visibility and the engagement achieved. We look forward to building on this partnership for future initiatives.

Warm regards,

[Your Name]

5.0 Financial Governance & Accountability

Financial governance defines the system of rules, practices, and processes by which the society's finances are directed and controlled. It establishes a structure of accountability to protect the society's funds and reputation

5.1 Roles & Responsibilities

Clear segregation of financial duties is a fundamental internal control to prevent errors and fraud

Role	Financial Responsibilities
President	• Policy Enforcement and Oversight. Holds ultimate responsibility for the society's operation and acts as a key internal control. • Approves all spending requests and financial contracts; ensures the Treasurer adheres to the official policies; signs off on final budgets and reports
Treasurer	• Execution and Record-Keeping; The main custodian of the society's finances and official records. • Manages bank accounts; Tracks all income and expenses; performs bank reconciliation; prepares all financial reports and budgets.
Executive Committee	• Strategic Approval and Scrutiny. Provides governance and direction for the budget. • Reviews and formally approves the annual budget; questions monthly/quarterly financial reports and spending variances; votes on all major, unbudgeted expenditures.
Spending Members	• Compliance and Documentation. Accountable for any funds they spend on the society's behalf. • Obtains pre-approval for all purchases; secures and submits original, itemized receipts promptly; provides clear business purpose on claim forms.

5.2 Approvals Process

To ensure accountability, no transaction should be initiated or completed by a single person. All spending must follow the principle of Dual Authorisation.

1. Spending Pre-Approval: Any member intending to spend society funds (via society card or for reimbursement) must first receive written pre-approval (email or designated form) from the President or an authorised committee member. The approval must confirm the spending aligns with the approved annual budget.
2. Payment Authorisation: Once the expense has been incurred and the required documentation (receipt and claim form) is submitted, the President must review the complete claim. The Treasurer only processes the final payment (reimbursement or bank transfer) after the President has signed or digitally approved the completed claim.
3. Cheque/Transfer Authorisation: Any high-value financial transaction (e.g., contracts, major venue deposits) over a set threshold (e.g., $500) must require two distinct authorized signatures (typically the Treasurer and the President) on the bank instruction or payment form, as per University/Union policy.

5.3 Reporting

Regular reporting ensures the committee is always informed of the society's financial health, enabling proactive decision-making.

<table>
<tr><th>Quarterly Financial Report (QFR)</th><th>Annual Financial Report (AFR):</th></tr>
<tr><td>Purpose: To provide a mid-year check-up, comparing performance against the annual plan.
Content: A Budget-to-Actual (BVA) Report showing a summary of income and expenses for the quarter, including a detailed Variance Analysis explaining any difference greater than ±10% in major budget lines.
Action: Presented to the Executive Committee for discussion and a formal vote on any necessary budget amendments.</td><td>Purpose: The final, comprehensive summary of the society's financial activity for the entire fiscal year. This is required for audit and submission to the University/Union.
Content:
Statement of Financial Position (Balance Sheet): Showing total Assets, Liabilities, and Fund Balance (Net Worth) as of the year-end date.
Statement of Activities (Income Statement): Showing all Income and all Expenses for the year, resulting in the final Surplus or Deficit.
A reconciliation of the final bank balance to the reported Fund Balance.</td></tr>
</table>

5.4 Audit/Handover Pack

The final step in the cycle is preparing the financial records for the external audit and ensuring a seamless transfer of knowledge to the next committee.

The Audit/Handover Pack Must Include:

1. The Master Financial Ledger: The complete, finalised income and expense spreadsheet, signed off by the outgoing Treasurer and President.
2. Complete Documentation Archive: A dedicated digital folder containing scanned copies of *every single receipt, invoice, bank statement, and expense claim form* for the year.
3. The Annual Financial Report (AFR): The final, signed document submitted to the University/Union.
4. Treasurer's Notes/Manual: A detailed guide written by the outgoing Treasurer covering:
    - How to access all accounts and software.
    - Key contacts (bank, sponsor, University finance).
    - List of recurring expenses (subscriptions, rent) and when they are due.
    - Recommendations for budget improvements based on the year's experience.

6.0 Tips for Long-Term Success

6.1 Always keep society funds in a dedicated account (not personal)

This is the most crucial rule of financial governance. Under no circumstances should society income (e.g., membership fees, sponsorship payments) be deposited into a personal bank account.

a. Protect the Treasurer: Using a personal account instantly mixes society and private funds, leading to impossible reconciliation, tax complications, and personal liability for the Treasurer.
b. Audit Compliance: University and Student Union auditors require clear, clean bank statements that only show society transactions.
c. Continuity: A dedicated society account allows access to be easily transferred to the incoming Treasurer without delays or closing accounts.

6.2 Build relationships with recurring sponsors

Relying on one-off grants makes budgeting unpredictable. Developing consistent sponsorship income is key to stability.

a. Focus on Value: Treat sponsors as partners, not just cash sources. Document the metrics (e.g., event attendance, social media reach) that prove the sponsor received value for their investment.
b. The Handover File: Create a Sponsor Contact Log documenting key contact names, their last payment amount, and the renewal date. This prevents the new committee from having to build relationships from scratch.
c. Diversify Income Streams: Actively pursue a balance of income from membership fees, fundraising, and external partners to ensure financial resilience.

6.3 Document everything for handovers

High committee turnover is the single greatest threat to a society's financial continuity. Your primary goal is to make the transition seamless.

a. The Digital Knowledge Hub: Everything related to finance must be stored in a shared, permanent, cloud-based folder that belongs to the society, not the individual Treasurer. This includes the final budget, all reports, contracts, and the complete Handover Pack.
b. Annotate the Ledger: Use the Notes column in your master financial ledger to explain non-standard transactions or decisions (e.g., "Invoice paid late due to contract delay").

6.4 Train shadow committee members early

Do not wait until the last month of the term to start the handover. Active training ensures institutional knowledge is passed on effectively.

a. The Shadow Period: The incoming Treasurer should be elected or appointed early and begin training immediately. They should shadow the outgoing Treasurer for at least one month, sitting in on financial meetings and watching the processing of expense claims and bank reconciliation.
b. "Teach One, Do One, Review One": Have the shadow member perform key tasks (like a bank deposit or report generation) while being supervised. This is the only way to ensure they know the practical steps.

6.5 Celebrate Financial Wins and Good Stewardship

A positive culture around finance boosts trust and encourages future involvement and funding.

a. Recognise Efficiency: Publicly acknowledge successful cost-saving efforts or major fundraising goals achieved. For example, mention in a general meeting that "the negotiation on the venue saved us 15%."
b. Report the Success: Use the Annual Financial Report to show members and the institution how efficiently their funds were used to support the mission (e.g., "85% of all funds went directly to member programming"). This encourages higher membership rates and grant funding

6.6 Strategic Use of Surpluses and Reserves

If your society ends the year with a positive fund balance (a surplus), that money should be allocated with a strategic purpose, not just left in the bank.

a. The Reserve Fund (The "Rainy Day" Fund): Establish a minimum target amount that the society must maintain at all times (e.g., covering three months of fixed operating costs). This fund acts as a safety net against unexpected low membership numbers or last-minute event cancellations.

Strategic Investment: Use planned surpluses to make investments that reduce future operating costs or enhance member value. Examples include purchasing quality, reusable equipment (e.g., banners, sound equipment) or subsidising a high-value event to make it more accessible.

7.0 Essential Tools & Templates

To kickstart your society's financial progress this playbook includes editable versions of:

1. Annual Budget Sheet Template
2. Event Account Template
3. Proposal Template
4. Expense Reimbursement Form Template

7.1 Annual Budget Sheet Template

Download Annual Budget Sheet Template

7.2 Event Account Template

Download Event Account Template

7.3 Proposal Template

Download Proposal Template

7.4 Expense Reimbursement Form

Download Expense Reimbursement Form Template

7.5 Example of an Annual Report

Example of Annual Report