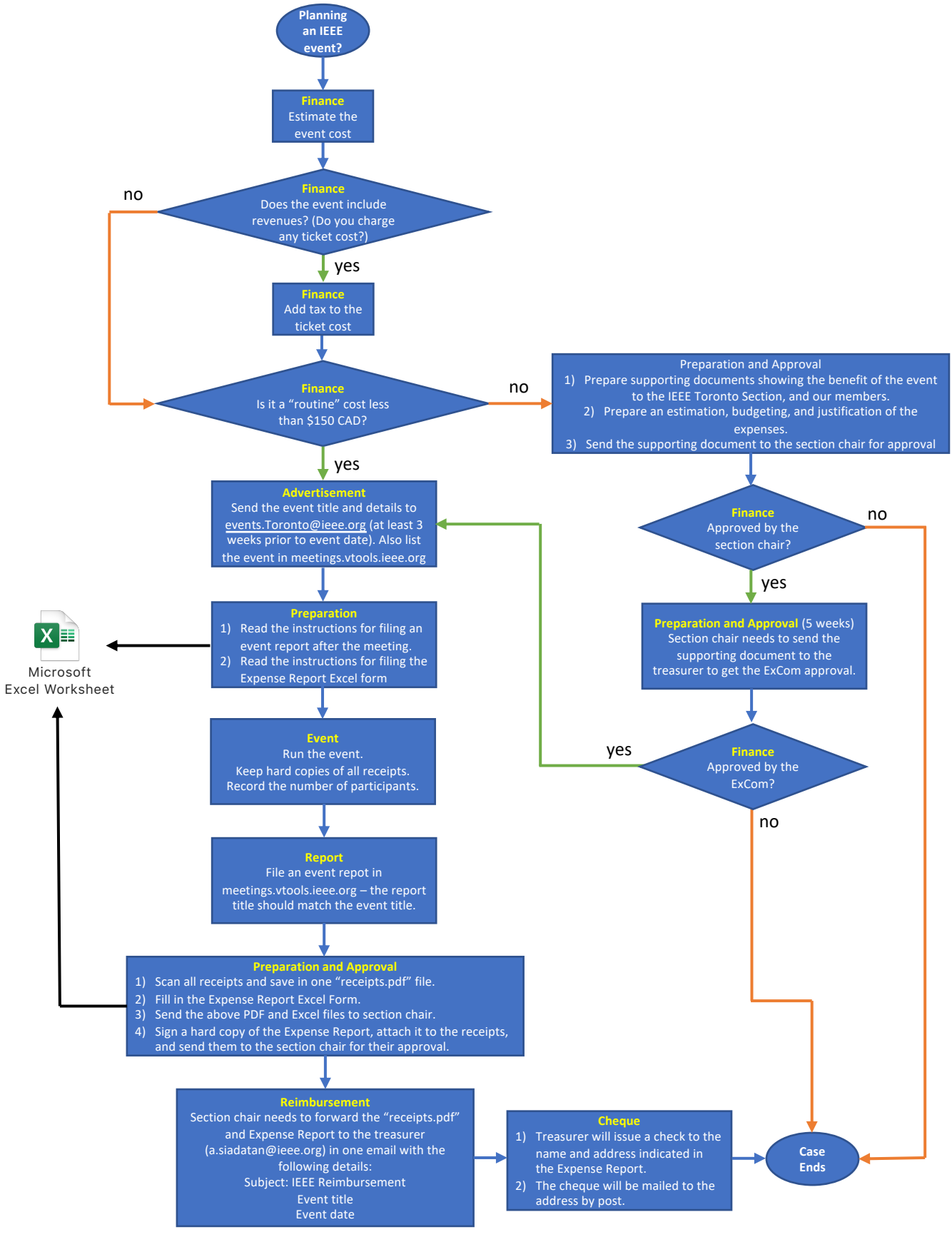
Planning an IEEE event?
Finance
Estimate the event cost
Finance
Does the event include revenues? (Do you charge any ticket cost?)
no
yes
Finance
Add tax to the ticket cost
Finance
Is it a "routine" cost less than $150 CAD?
no
yes
Preparation and Approval
1) Prepare supporting documents showing the benefit of the event to the IEEE Toronto Section, and our members.
2) Prepare an estimation, budgeting, and justification of the expenses.
3) Send the supporting document to the section chair for approval
Finance
Approved by the section chair?
no
yes
Preparation and Approval (5 weeks)
Section chair needs to send the supporting document to the treasurer to get the ExCom approval.
Finance
Approved by the ExCom?
yes
no
Advertisement
Send the event title and details to events.Toronto@ieee.org (at least 3 weeks prior to event date). Also list the event in meetings.vtools.ieee.org
Preparation
1) Read the instructions for filing an event report after the meeting.
2) Read the instructions for filing the Expense Report Excel form
Microsoft Excel Worksheet
Event
Run the event.
Keep hard copies of all receipts.
Record the number of participants.
Report
File an event repot in meetings.vtools.ieee.org – the report title should match the event title.
Preparation and Approval
1) Scan all receipts and save in one "receipts.pdf" file.
2) Fill in the Expense Report Excel Form.
3) Send the above PDF and Excel files to section chair.
4) Sign a hard copy of the Expense Report, attach it to the receipts, and send them to the section chair for their approval.
Reimbursement
Section chair needs to forward the "receipts.pdf" and Expense Report to the treasurer (a.siadatan@ieee.org) in one email with the following details:
Subject: IEEE Reimbursement
Event title
Event date
Cheque
1) Treasurer will issue a check to the name and address indicated in the Expense Report.
2) The cheque will be mailed to the address by post.
Case Ends