

# The Ohio State University 2020 VBMA Chapter Operations Manual



# Before you Transition Each Year!

## ***Outgoing officers:***

1. Update your chapter operations manual (COM) from the previous year and provide a copy to the national board and your chapter's new officers. This includes:
  - a. Responsibilities and tips for each officer position
  - b. Events, financial information and important contacts
  - c. Any other chapter specific information that may have changed in the last year

## ***Incoming officers:***

1. Browse the VBMA website to learn what it has to offer for both officers and general members
  - a. Get to know your regional leader, national officers, national requirements and more about what the VBMA has to offer your chapter
  - b. Review the national good standing requirements
2. Talk to old officers to make sure you have all the information you will need for your term.
3. Review the updated chapter operations manual (COM) provided by the outgoing officers.



## SECTION 1:

### Chapter Transition & Chapter Officer Information

#### Section 1A: Chapter Transition Information

Month of Officer Elections/Selections	October
Month of Officer Transition	January

#### Section 1B: Chapter Officer Information

Think about the following items as responsibilities are assigned to each position. Additionally, some responsibilities may be shared by all board members:

- (1) Local Responsibilities
  - a. Chapter finances
  - b. Liaison to the school administration
  - c. Recruiting speakers and coordinating events
  - d. Membership/Attendance tracking
- (2) Regional Responsibilities
  - a. Identify two officers who will be liaisons between your chapter and your RL (one must be the president of the chapter)
  - b. Business certificate attendance report submissions
- (3) National Responsibilities
  - a. Event report submission
  - b. Financial report submission
  - c. Chapter contract and chapter information sheet submission
  - d. Forum posts (chance for additional metrics points, but not required)
  - e. Website manager (this person is responsible for approving new members who join the website under your chapter)

You should update this section before each transition so that incoming officers have the most up-to-date information about their responsibilities and tips for how to go about fulfilling these duties.



## PRESIDENT

CURRENT PRESIDENT: *Jorge Eduardo Mendoza*

EMAIL: mendoza.773@osu.edu

PREVIOUS PRESIDENT: *Marsi Arellano*

How to contact previous president: arellano.21@osu.edu

### Responsibilities of the Position

1. Secure outside sponsorship for our chapter of the VBMA
2. Form relationships with potential sponsors and be sure they receive proper recognition for their donations. Make any modifications to approved local sponsorship tiers.
3. Negotiate contracts with these outside sponsors
4. Oversee all meetings. Present agenda to open each general meeting.
5. Serve as liaisons between your chapter and your regional leader/NVBMA, providing updates to the regional leader and participating on the NVBMA website discussion boards. Submit Quarterly reports.
6. Serve as the liaison with school officials.
7. Arrange lectures and reserve locations for events.
8. Secure speakers for lectures, introduce speakers, and write thank you cards.
9. Update Carmen, Facebook, and school website information.
10. Give presentation about VBMA to potential new members.
11. Order business cards (edit membership with the Director of Compliance). Delegated to director of fundraising
12. Submit club information through school Union (allows us to receive funding). To do this, the president must go through officer training spring semester.

### Tips for Success

1. **Plan ahead:** Think about events and initiatives for the upcoming semester before it starts and get things on the student calendar as soon as you can- with many other clubs trying to plan events, it can be quite a headache figuring out dates. Everyone also has really busy schedules in terms of exams and quizzes so it can help if you have a calendar where you write them down for each of the classes and try to find dates that don't conflict with a busy part of the quarter/semester.
2. **Organization:** Provide a detailed agenda for every meeting to keep your board focused during the meeting and ensure everyone is on the same page. You can refer back to the notes that you wrote on the last agenda to prepare for the next as well as it keeps track of the goals and initiatives. We typically have a board meeting about 3-4 times a semester, and they usually fall before an upcoming event. The meetings are only an hour so they can go really fast and it keeps you on track in terms of the business you need to get through.
3. **Delegate:** It is really important to delegate to the members of your board and keep their vision/opinions as part of decisions. I think past boards have had trouble where one or two people try and run the board under their style and don't use the input of the entire board. It



caused conflict, and not only affects the board, but the entire organization. Plus, there is just WAY too much to do by yourself...that's why you have the board in the first place.

## VICE-PRESIDENT

CURRENT VICE-PRESIDENT: Caley Ritts  
Email: ritts.5@osu.edu

PREVIOUS VICE-PRESIDENT: Breanna Lincoski  
EMAIL: lincoski.1@osu.edu

### Responsibilities of the Position

1. Help to Coordinate all programs.
2. Oversee events committee and arrange for food, drink, and photographs at each meeting. Submit all receipts to treasurer and submit event cost to compliance chair.
3. The VP needs to be able to plan ahead (months ahead), network and maintain contacts at every opportunity, and keep the other officers informed of the schedule of events as it comes together.
4. Purchase speaker parking permits.
5. Assist in planning etiquette dinner if needed.

### Tips for Success

1. Always be sure to keep a running dialogue with the VBMA President. Each person is an individual and may or may not need help with certain things. You won't know how to help the President until you ask.
2. Food: Make some calls to various local food places and keep a running list for catering prices. When it's time to discuss food and price ranges for upcoming events, you'll already have the info ready.
3. Coke grant: despite checking the box for cases of water, there were several times we did not receive any when awarded the cases of pop. I made sure in the comments section to mention that it is our most popular drink and we have been awarded cases of water ever since.



## TREASURER (Director of Finance)

CURRENT TREASURER: *Alyssa Nelson*  
EMAIL: *Nelson.1189@osu.edu*

PREVIOUS TREASURER: *Alyssa Nelson*  
How to contact previous treasurer: *Nelson.1189@osu.edu*

### Responsibilities of the Position

1. Maintain and balance all accounts & provide insights on expenditures.
2. Complete all applications, audits, & requirements for funding.
3. Receive applications for business education fund and disburse monies yearly.
4. Provide sponsors with audits per requests.
5. Submit the Annual Financial Report to the NVBMA.
6. Look for sponsorship for food and speaker fees.
7. Work closely with the VP and president when it comes to making purchasing decisions for lectures and club events.

### Tips for Success

1. Stay on top of the bookkeeping for bank deposits, checks, and all other money going in/out.
2. If you don't attend any other fundraiser for the year, definitely sell merchandise to the first years at orientation. They love the bumper stickers!
3. Attend the National meeting to meet the national finance director and learn about the required annual audit submission to NVBMA.



## Director of Compliance

CURRENT: *Kyleigh Tyler*  
EMAIL: *tyler.240@osu.edu*

PREVIOUS: *Leah Giralico*  
How to contact previous: *giralico.1@osu.edu*

## Responsibilities of the Position

1. Maintain minutes for all meetings (executive and general).
2. Update member spreadsheet, including dues paid and add new members to the email listserv. Listserv: [lists.osu.edu/mailman/admin/vbma](mailto:lists.osu.edu/mailman/admin/vbma)  
username: vbma  
password: osucvmvbma
3. Update the Chapter Operations Manual each year.
4. Submit all documents to nationals (except the financial report), including the annual NVBMA contract, the Chapter Information Sheet, the Chapter Operations Manual, Quarter reports, and Event Reports. In addition, serve as the other liaison to the regional leader/NVBMA, providing updates to the regional leader and participating on the NVBMA website discussion boards.
5. At the beginning of each school year, oversee the printing of membership business cards. Delegated to the director of fundraising.

## Tips for Success

1. Submit event reports directly after events and stay up to date on when NVBMA documents are due. (The annual contract is due in the fall and the **chapter information sheet and chapter operations manual is due within one week of officer transition**). Event reports are due **within 2 weeks** following the event.
2. Start early with business card printing, as soon as you can after the membership application deadline.
3. Send minutes out within a couple days of the executive meeting to the executive board to fill in officers that may have not been present.



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<b>Director of Marketing</b>
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<p>CURRENT: <i>Keith Gilchrist</i> EMAIL: <a href="mailto:gilchrist.69@osu.edu">gilchrist.69@osu.edu</a></p>
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<p>PREVIOUS: <i>Please refer questions to Vice-president or president</i> How to contact previous: <a href="mailto:lincoski.1@osu.edu">lincoski.1@osu.edu</a> or <a href="mailto:arellano.21@osu.edu">arellano.21@osu.edu</a></p>
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<b>Responsibilities of the Position</b>
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|---|
| 1. Write all club emails, including a weekly newsletter; make, monitor, and send/receive all RSVP's.  |
| 2. Keep the bulletin board(s) current with upcoming events.   |
| 3. Create and maintain a display board for all sales and open houses, featuring the logo, mission statement, etc. of VBMA.  |
| 4. Focus on bringing in new members and retaining current members, and creating and promoting member perks (members-only meetings, email quizzes with prizes, etc.) |
| 5. Maintain club's gmail account and Listserv in conjunction with director of compliance  |

<b>Tips for Success</b>
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| 1. Get in touch with the membership early and often. Market to the students, particularly first and second year classes, by announcing upcoming events in an excited but professional manner and attempt to convey the importance of business management and attending added lunch lectures that can help them with their future careers. |
| 2. Grab members' attention! Use color! But above all make certain the e-mails sent to the student body are clean, concise, and not too busy/distracting so that the information is presented in an informational yet eye-catching way.  |
| 3. Use the gmail account to communicate with members. Double check all content in emails/flyers before sending/printing.  |





## Events Coordinator

CURRENT: *Please refer to the President or Vice President*

EMAIL: [mendoza.773@osu.edu](mailto:mendoza.773@osu.edu) or [ritt.5@osu.edu](mailto:ritts.5@osu.edu)

PREVIOUS: *Melissa Bujanda*

How to contact previous: [bujanda.1@osu.edu](mailto:bujanda.1@osu.edu)

## Responsibilities of the Position

1. Work closely with the Vice President to organize big events, such as the etiquette dinner +/- round table event.
2. Plan a social for the club at least once per semester.
3. Organize and be the coordinator for any competitions sponsored by our corporate sponsors, such as VPI and clinician's brief.

## Tips for Success

1. When ordering food, tell them to deliver at least 20 minutes before the beginning of the meeting. Also plan ahead if you will need to pick up the Coke Grant from The Union. You'll just need the time and a car, as well as a friend to help carry the soda/water.
2. When organizing fundraisers, City Barbeque has a great deal for dine-to-donate, so look into them! Rita's and Applebee's also are options we have used in the past.
3. Stay in close contact with the Vice President, as you will be working together to help plan events.
4. The union sells group tickets for a lot of events through discount tickets. You can place the order online and then go to the union to pick up all the tickets at once. We got cheap Blue Jacket tickets this way.
5. Plan the 1<sup>st</sup> social of the year, early in the semester to encourage 1<sup>st</sup> year participation.



6. Complete your VPI competition submission early in the competition. It makes it easier to answer questions from your classmates.

### Director of the Business Certificate Program

CURRENT: Kyleigh Tyler  
 EMAIL: [tyler.240@osu.edu](mailto:tyler.240@osu.edu)

PREVIOUS: *Alexandra Pinhasi*  
 How to contact previous: [Pinhasi.2@osu.edu](mailto:Pinhasi.2@osu.edu)

### Responsibilities of the Position

1. Determine the appropriate category and point allowance of all lectures.
2. Maintain accurate and proper cumulative attendance logs for all members participating in the business certificate program
3. Coordinate and keep in contact with the National VBMA regarding all documentation required to fulfill certification for eligible members
4. Create the meeting on the MyVBMA website for all lectures. Approve and deny students from the lectures in accordance with the attendance logs for all members participating in the business certificate program.
5. Submit records for members participating in the business certificate program when they have earned their certification. Collect and distribute certificates to the students.

### Tips for Success

1. This is a new position, so start by speaking with the old director of the Business Certificate Program for details.
2. Familiarize yourself with the Business Certificate program via the national website at [vbma.biz](http://vbma.biz)
3. Familiarize yourself with the MyVBMA website to learn how to create and change meetings, accept and deny students both during and after meetings.



4. Keep a backup list of points to compare with the website in case any members participating in the program don't make a MyVBMA account and attend lectures.

### **Director of Fundraising**

CURRENT: Emily Winson  
 EMAIL: Winson.3@osu.edu

PREVIOUS: Courtney Carlson  
 How to contact previous: carlson.496@osu.edu

### **Responsibilities of the Position**

1. Manages all our fundraising activities for club funds and charity donations. Plan and execute charity fundraisers on behalf of The Ohio State University's VBMA chapter. Organize fundraisers to raise money for lectures and other activities related to the BCP program, including designing, purchasing, organizing, and maintaining merchandise and selling it at school-organized fundraisers.
2. Responsible for ordering merchandise items and overseeing merchandise sales (ie making sure members are signed up to cover the tables and supplies are there).
3. Keep a list of VBMA members who volunteer at merchandise sales.
4. Previously has been responsible for doing the business cards for members and as a fundraiser

### **Tips for Success**

1. Keep an up to date inventory. Make sure to order new inventory well in advance of sales.



2. Send email for merchandise volunteer shifts. Print \$5 off coupons for members who volunteer. Track officer shift requirement and notify officers who still need to fulfill a shift.



## GENERAL RESPONSIBILITIES OF THE VBMA BOARD

### Responsibilities of all Officers

1. Assist other officers with their duties if needed.
2. Work to ensure the success of our events by helping the Vice President and Events Coordinator with event details, such as food, drink, and the speaker.
3. Attend all meetings and contribute ideas to the group. Only allowed to miss due to class or work. Very important that everyone is present.
4. Attend the NVBMA conference at the start of your term.
5. Encourage classmates to join VBMA!
6. Fulfill one merchandise shift to support raising funds for VBMA.
7. Complete and submit a VPI case for competition during spring semester.
8. Attend all VBMA events

### Tips for Success

1. Meet regularly and break up the workload. We're all in this together!
2. Brainstorm event ideas with the whole executive board as well as your advisors, this will help come up with new and exciting ideas for each semester!
3. Help make speakers feel welcome and appreciated. It always helps to maintain a great relationship with speakers, as we may contact them again in the future!



## SECTION 2:

### Chapter Bylaws and School Specific Rules

#### 1. Chapter By-Laws

- a. All chapters were required to submit by-laws for their chapter to be accepted into the National VBMA.
- b. If you do not have a copy of your chapters' by-laws, we suggest you contact your school to see if they have a copy on file (many schools require clubs to submit by-laws when they form).
- c. If you cannot get a copy of the by-laws from your chapter records or your school, please write a new by-laws document and include it in this manual. An example can be found on the National VBMA website – [www.vbma.biz](http://www.vbma.biz)
- d. The following should be included in all chapters' by laws:

*VBMA is committed to maintaining a fair and respectful environment conducive to our mission statement and our members' roles as veterinary students. To that end, VBMA prohibits any member, officer, including national, regional, and chapter officers, or advisor from harassing and/or discriminating against any other member of the VBMA because of that person's race, sex (including sexual harassment and pregnancy), sexual orientation, gender identity, ethnicity or national origin, religion, age, disabled status, military service or veteran status, height, weight, physical appearance, marital status, parental status, political affiliation, or veterinary study emphasis.*

*No person will be adversely affected as a result of bringing complaints to the VBMA national board. Incidents of harassment and discrimination will be met with appropriate disciplinary action, up to and including removal from the VBMA and national business certificate program. This policy is applicable to individual members, chapters, and the national organization.*

#### **COPY AND PASTE BY-LAWS HERE**

*The By-Laws of the*  
**Veterinary Business Management Association**  
**The Ohio State University**

#### *Article I- Name, Mission & Non-Discrimination Policy*

Section 1. The organization will be known as the Veterinary Business Management Association (VBMA) of the College of Veterinary Medicine at The Ohio State University.



Section 2. The mission of the VBMA is to accompany and enhance the veterinary curriculum by increasing student awareness and knowledge regarding the topics of business, finance, management, and related disciplines as they pertain to the practice of veterinary medicine.

Section 3. The VBMA and its members shall not discriminate against any individual(s) for reasons of race, color, creed, religion, sexual orientation, national origin, sex, age, handicap or veteran status.

### *Article II- Membership*

Section 1. Any individual affiliated with The Ohio State University may be a member, assuming they are in good standing with said university. However, only currently enrolled veterinary students may be voting members or officers. Those not enrolled as veterinary students are eligible to be affiliate members.

Section 2. A person is considered to be a member upon payment of dues for the current academic year.

Section 3. Dues for voting and affiliate members will be set annually by majority decision of the Executive Council prior to the beginning of Autumn quarter.

Section 4. A member may be removed from office by a two-thirds vote of the Executive Council. The member in question must be given fourteen days advance notice of the removal vote in order to submit a statement in their defense.

### *Article III- Organization Leadership*

Section 1. The officer positions shall consist of President, Vice President, Secretary and Treasurer.

Section 2. Officers will be elected at a regular meeting during the Winter Quarter. An opportunity for nominations of candidates will be provided and announced prior to elections. To be elected, a candidate must secure a majority of votes of those eligible voting members present at the time of election.

Section 3. Vacancies occurring among the offices will be filled by appointment of the President, at the next regular meeting after the vacancy occurs. In the case of a vacancy in the office of President, the Vice President shall assume the role of President, and a new Vice President shall be appointed.

Section 4. An officer may be removed from office for dereliction of duty by a two-thirds vote of the Executive Council. The officer in question must be given fourteen days advance notice of the removal vote in order to submit a statement in their defense.



Section 5. The duties of the officers shall be as follows:

1. President- To preside over all meetings of the VBMA and all meetings of the VBMA officers; to administer the VBMA program; to register the VBMA annually with the appropriate office of The Ohio State University; to represent the VBMA in an official capacity.
2. Vice President- To preside in the absence of the President; to perform such other tasks as the President may assign; to plan and implement, with advice from fellow officers, a schedule of meetings and/or educational symposia during each academic year.
3. Secretary- To prepare minutes of all VBMA meetings; to maintain a list of membership; to send official VBMA correspondence; to coordinate preparation and distribution of VBMA publications.
4. Treasurer- To receive and distribute VBMA funds; to keep an account of all monetary transactions; to coordinate and oversee fundraising activities.

#### *Article IV- Other Positions*

Section 1. The President will appoint, with the consent of the majority of the officers, such project directors, committee chairpersons, committees and representatives as may contribute to the successful operation of the VBMA.

Section 2. The officers and project directors, chairpersons and representatives shall be known collectively as the Executive Council, and will meet at the direction of the President to discuss organizational business, program planning and other such concerns as they pertain to the function of the organization.

#### *Article V- Adviser*

Section 1. The advisor must be a full-time member of the University faculty or Administrative and Professional staff. If a person serving as an adviser is not a member of these classifications, a co-adviser must be chosen who is a member of these University classifications.

Section 2. The adviser's duties shall include assisting the organization, as the adviser sees fit, in development of vision, mission, programs and activities.

#### *Article VI- Meetings*





Section 1. Meetings shall be held for general members at least twice per quarter, excluding Summer. An announcement of all general meetings should be made sufficiently in advance in order to notify all constituents.

Section 2. Additional general meetings and meetings of the Executive Council will be determined and announced by the President.

#### *Article VII- Constitutional Amendments*

Section 1. All proposed amendments to the constitution must be made in writing. Amendments will be presented at the general meeting following proposal in order to give the membership time to consider the amendment. The amendment will be presented again at the subsequent general meeting, at which time a vote from the membership will be taken.

Section 2. A proposed amendment will be accepted only if three-fourths of the membership votes in favor of the amendment.

#### *Article VIII- Dissolution*

Section 1. This organization shall be dissolved upon a three-fourths vote of the membership, as well as a three-fourths vote of the Executive Council.

Section 2. Upon dissolution of this organization, the Executive Council shall, upon payment of all liabilities of this organization, dispose of all assets in the following manner:

1. Reimburse dues to all members on a prorated basis;
2. Forward the remaining assets to the Ohio State University College of Veterinary Medicine with the request that they should be retained and made available to this organization should it be reorganized within one year, or;
3. Contribute the remaining assets to a non-profit organization that serves the needs of the veterinary profession in Ohio.



## 2. School-Specific Rules/Regulations

a. Please list any school-specific rules such as limitations on charging dues, accepting sponsorship money, or the number of events you are permitted to hold each year.

N/A

## 3. Advisor Information

<b>Name:</b>	Amanda Fark
<b>Position:</b>	Director of Office of Career Management
<b>School Mailing Address:</b>	1900 Coffey Rd, Columbus, OH 43210
<b>Email:</b>	<a href="mailto:Fark.9@osu.edu">Fark.9@osu.edu</a>
<b>School Phone Number:</b>	(614) 292-7227

## 4. School-Specific Contacts

a. ie-Graduate Student Events Coordinator, Dean of Students, Business Faculty, etc.

N/A



## SECTION 3: Financial Records

### 1. Financial Report

- a. Please include a copy of the most recent financial report submitted to the NVBMA which can be helpful to the incoming officers when they have to fill out next year's financial records.
  - 2018 Financial Report located in Club Google Drive under the Finance Tab> Financial Report
  - <https://drive.google.com/drive/folders/0B6gp98pDMjwQSjVpQUxQaW85Rms>
- b. Please include any receipts and financial records from the last quarter for new officers' reference. These documents are commonly organized in a treasurer's binder.
  - Please reference the Club Google Drive under the Finance Tab > Receipts > 2017-18

Filled by Director of Finance. See full treasurer binder.

### 2. School Contact Information

- a. In order to receive National VBMA funding and proper communication, this must be a legitimate USPS address.

*\*\*Checks are sent directly to the school, NOT to individual officers at their home addresses.*

<b>School Name:</b>	The Ohio State University
<b>Attn: (if applicable)</b>	VBMA
<b>Address:</b>	1900 Coffey Rd.
<b>City:</b>	Columbus
<b>State:</b>	OH
<b>Zip:</b>	43210

### 3. VBMA Bank Account Information



<b>Banking Institution:</b>	Fifth Third Bank
<b>Routing Number:</b>	044002161
<b>Checking Account Number:</b>	7280221297
<b>Savings Account Number:</b>	9281867995

#### 4. Accounting Procedures

a. If your chapter follows specific accounting procedures, please outline them here.

N/A

#### 5. Chapter Financial Record Workbooks

a. Use the following tables to help keep track of your financial information throughout the year. This will make filling out the annual financial report much easier.

Filled by Director of Finance

On National drive and event reports online.

#### SECTION 4:

##### Speakers, Events and Sponsorship

1. Event Reports
  - a. Check northeast google drive for the attendance sheets and event reports are submitted through the VBMA.biz officer page or can be found under the compliance folder n the google drive
2. sponsor and speaker contact information
  - a. We have only used VBMA/PLIT and banfield

NAME: Dr. Oded Marcovici

AFFILIATION: VCA

FEE GIFT/THANK YOU: \$50 thank you giftcard to starbucks



NAME: Dr. Lance Roasa

AFFILIATION: The Roasa Law Group, PC

