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## **ACCOUNTING**

**BUDGET** - The annual budget is prepared by the Treasurer based on previous year numbers and presented at the June Board meeting for final discussion and approval.

Financial position is presented at each Board meeting by the Treasurer, showing annual budget, year to date income, expenses and current month financial position.

Any expenditure not included in the annual budget must be approved by the Board.

**BANK ACCOUNT** - The Society bank is the Toronto Dominion Bank in North Hills. Two signatures are required on all cheques. Signing officers are the Treasurer, the President and the Secretary.

**BILL PAYMENT** - All expenses are paid by the Treasurer by cheque. A copy of the bill must be on file with the cheque number and budget line/code.

**CASH RECEIPTS & DEPOSITS** - All cash, cheques and credit card payments are issued a receipt and deposited in the Society bank account. Deposits are reconciled to the bank statement monthly by the bookkeeper and reviewed by the Treasurer.

**EXPENSE REQUEST FOR REIMBURSEMENT** - All requests for funds must be accompanied by dated receipts, an explanation of the expense, signed and totalled on a Request for Repayment form and sent to the KALS office for processing by the bookkeeper and reviewed by the Treasurer.

**INCOME TAX RECEIPTS** - Official receipts for tax purposes are provided for cash donations by the Treasurer who will issue these when the money has been deposited. The Treasurer will advise the Board of donations so they can be acknowledged. Gifts-in-kind must be appraised by a qualified person by the donor for a receipt.

**NSF CHEQUES** - A charge of \$10.00 plus bank charges will be assessed to returned cheques.

**OPERATING RESERVE** - A reserve fund target equal to one year of expenses will be established to ensure the organization has sufficient funds for one-time expenses, capital costs or emergency expenses.

## **CLASS REGISTRATION**

**FEES** - Class fees are set to cover the cost of space, material, and paid support services. All class registrations require a current annual membership.

**FINANCIAL AID** - Requests for financial aid will be sent to the President for discussion with the person and based on a series of questions approved by the Board. Decisions will be communicated to the office and Treasurer in writing.

**REFUNDS** - Refund requests must be received in the office in writing ten days before the class start date and a \$10 cancellation fee will be charged. There are no partial refunds. One session courses will not be refunded. The Program Chair will approve class refunds. In extraordinary circumstances (death, major illness) the Program Chair and President will consider refunds.

**GUEST PRIVILEGES** - Members may bring a guest at no cost to one session of multi-session classes. Guests must pay for one session classes but do not have to purchase a membership.

**CLASS SUPPLIES** - A list of class supplies to be purchased by students is to be included in the course description. The office is to be advised where supplies can be purchased. Photocopying can be provided by the office; at the UPS Store or reimbursed to the instructor at 5 cents per copy with a signed invoice.

**CLASS LISTS** - The office will email a list of students to course instructors, hosts and coordinators two days prior to course start and send updated class additions as needed.

**CLASS SIZE** - Class size will be determined by the instructor and the space available.

**CANCELLED CLASS** - If a class is cancelled the Program Chair will advise the office so that the schedule can be updated. Refunds will be mailed or may be kept on file as a credit for a future class.

## **CHARITABLE STATUS**

**DONATIONS - IN MEMORIAM & GENERAL** - The Society is a registered Canadian charity and is able to receive donations and issue tax exempt receipts. The official receipts with the Society charitable status number are managed by the Treasurer. Donations over \$10 will be issued a receipt.

**REVENUE CANADA ANNUAL REPORT FILING** - The Treasurer with the support of the Secretary will ensure the paperwork is completed and sent to Revenue Canada.

**BC SOCIETY ACT ANNUAL REPORT FILING** - The Secretary will ensure the paperwork is completed and sent with the annual filing fee to the BC Registrar by the filing date.

## **CONTRACTS**

**BUSINESS SERVICES** - Regular business service contracts are to be in the name of the Society, billed to the Society mailing address and paid for by a Society cheque. Contracts over \$500.00 must be in writing and approved by the Board.

## **OFFICE**

**MAILING ADDRESS & OFFICE HOURS** - The office is located in the Cunliffe Building, 262 Lorne Street, Kamloops, BC, V2C 1W1. Hours are 9:00 am to 4:00 pm Monday to Friday.

**PHONE NUMBER:** 236-425-4414.

**EMAIL ADDRESS:** info@kals.ca

## **INSURANCE**

The Society will carry sufficient insurance to protect directors, officers and volunteers from liability, volunteer and participant injury and tenant liability.

## **MEMBERSHIP**

**FEES** - The annual fee for membership is \$15.00 and the membership year is July to June. Half year memberships are not available.

**MEMBERSHIP LIST** - A list of members with current contract information is maintained by the office. Individual contract information will only be provided to class instructors and hosts to be used in the event a class must be cancelled or to provide information regarding the class.

**MAILING LISTS** - List of members and non-members will be maintained by the office and kept confidential and used only for the purposes of contacting people about the business of the Society. Lists will not be sold.

## **PROGRAM**

The Program Committee will develop courses for two semesters a year. The Fall schedule runs from September until December. The Winter/Spring session runs from January until June.

The final program will be provided to the office and Publicity Chair at least two weeks in advance of publication on the website to ensure adequate time for registration and administrative preparation. Registration dates will be finalized by the Board in June and October.

## **PUBLICITY**

**PR PLAN** - The Publicity Committee will consult with the Program Committee and develop a communication plan before each semester. The plan will include both the costs and timing of free and paid advertising.

**CLASS SCHEDULE** - The Program Committee Chair will provide the final schedule to the Publicity Chair and office two weeks before registration begins. Courses publicized must be confirmed in the schedule.

**WEBSITE** - Changes to the website are made by the office on approval of the President.

## **VOLUNTEERS**

**VOLUNTEER LISTS** - A list of volunteers is maintained by the Volunteer Committee and office with contact info and volunteer roles.

**SUPPORT VOLUNTEERS** - Administrative, committee and board roles all ensure classes are delivered effectively and the Society business is efficient and cost effective.

**CLASS INSTRUCTORS** - All classes are led by volunteer instructors. Instructors will create their own presentations, provide a short synopsis of the course for publicity and indicate student supplies needed and space, equipment and other supports required. Any out of pocket expenses will be reimbursed on the proper form. Instructors are offered one free class registration in the semester in which they teach.

**CLASS COORDINATORS** - Each class is organized by a member of the Program Committee. The coordinator is the primary link to the instructor and provides the details to both the instructor and office of the requirements to hold the class. These include date and time, room set up, equipment and supplies needed, class description, instructor bio, and ensures the instructor has all of the supports needed to run the class. The Coordinator may also act as the class host.

**CLASS HOSTS** - Each class will have a host to manage administrative detail on the day of the class such as equipment, class lists, introductions, thank you, etc. Class Hosts do not pay for attending class.

A list of program volunteer names and contact info should be provided by the Program Chair to the office along with the program to facilitate communication and keep the volunteer list current.

## **RECOGNITION - MARGARET CLEAVELEY VOLUNTEER AWARD:**

The purpose of this award is to recognize service from KALS volunteers. The award is given

once a year and alternates between instructors and other support roles. The Volunteer Committee is responsible for calling for and vetting the nominations and preparations for presenting the award.

PROCESS:

- Board members nominate candidates in writing outlining reasons for the nomination;
- Nominations submitted 30 days in advance to the Volunteer Committee Chair;
- The Committee submits the list of qualified nominees to the Board with a recommendation or short list and the Board votes to confirm the final recipient;
- The award is presented at the Annual Members Social;
- Recognition includes: a framed certificate of appreciation, a \$50 gift certificate, and name included on the KALS permanent plaque. The plaque is given to the recipient to display for 10 months and then returned to the Volunteer Committee;
- An announcement and photo is sent to the print media immediately following the presentation.