



# Student Organization Organization Guide 2008-2009





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# **Statement of Purpose**

The Campus Center and Student Activities Department is part of the educational program of the University, providing opportunities for involvement and student leadership, programs that nurture personal growth and community development, and services that enhance life at WPI.

# Campus Center and Student Activities Department

# **Shared Values**

- Personal growth and development
- Service oriented
- Respect
- Ethical leadership
- Community building

# **Our Vision Statement**

Seeking innovative ways to better educate and serve all members of the WPI community.



# What We Do

Here in the Campus Center and Student Activities Office, we enjoy helping students involved in more than 160 clubs and organizations at WPI. We provide services to individual students, as well as student clubs and organizations. We can answer most questions, ranging from, "How can I get involved in a community service project?" to "How do I read my organization's budget?" to "Would this make a good fundraiser for my organization?" We also work closely with our many Greek letter organizations, new student orientation programs, Homecoming, Senior Class Board, Commencement and other special events, such as Winter Carnival and Quadfest. You name it, and we're probably involved! We have just about all the forms student groups could possibly need in the Student Activities Office, as well as the mailboxes for a large majority of the student groups.

# Who are the people who work in the CCSA Department?



Emily Perlow
Associate Director of Student Activities and Greek Life Programs

Emily is responsible for Greek Life programs and advises the 12 fraternities and 3 sororities, as well as Interfraternity Council, Panhellenic Council and Greek Alumni Council. She also serves as the Assistant Director to Orientation, Baccalaureate, and is responsible for Parents Weekend, community service programs, leadership programs, and the SOAP Fund. Her email address is <a href="mailto:eperlow@wpi.edu">eperlow@wpi.edu</a>.



Christine Girouard
Assistant Director of Student Activities

Christine serves primarily as the advisor for the Social Committee and other major programs such as QuadFest. She is responsible for the Student Organization Council and Student Speakers Fund, leadership programs, and is available to assist any student organization on campus. In addition, she assists with Orientation and advises the Senior Board. Her email address is cgirouard@wpi.edu.



Jay Sparling
Graduate Assistant, Community Service and Student Activities
Jay is responsible for the community service activities at WPI, including the Community
Service Work Study (CSWS) program. He also advises the Student Government Association.
His email address is <a href="mailto:jsparling@wpi.edu">jsparling@wpi.edu</a>.



Louise Campbell

Administrative Assistant

Louise performs a wide variety of specialized support functions for the CCSA office. She is knowledgeable about all of our office procedures and activities, and is here to answer any of your questions. Her email address is <a href="mailto:lpcamp@wpi.edu">lpcamp@wpi.edu</a>.

# Who are the people who work in the Campus Center Administrative Office?



Jim McLaughlin
Director of the Campus Center and Student Activities

Jim has overall responsibility for the Campus Center, New Student Orientation programs and student activities at WPI, and is responsible for supervision of the information center and office staff. His email address is <a href="mailto:jimmcl@wpi.edu">jimmcl@wpi.edu</a>.



Kim Wykes Administrative Assistant

Kim performs a wide variety of specialized support functions for the Campus Center Administrative Office. Kim is knowledgeable about all of our office procedures and activities including our Campus Center trips programs, and is here to answer any of your questions. Her email address is <a href="mailto:kwykes@wpi.edu">kwykes@wpi.edu</a>.

# **Frequently Asked Questions**

The Campus Center and Student Activities Office serves as a resource to all student clubs and organizations on campus. Below you will find some frequently asked questions that might be helpful to your club or organization.

# How do I start a new organization and who can I meet with to ask questions?

All information is located on our website at wpi.edu/+SAO/Orgs/Recognition, and you can set up a meeting.

# How can I get reimbursed for a purchase?

All financial forms are listed at wpi.edu/Admin/Acc/SAO. You must keep your receipts, fill out the form, and submit it with receipts to the SAO.

# Where can I send a fax?

The mailroom has a fax machine.

Do you have the forms I need? Expense reimbursement, check requests, locker requests, copier code requests? How do I fill them out? Yes, on our website wpi.edu/+SAO/Orgs/Forms.

# How can I get a purchase order?

In the CCSA Office. These may be accepted by businesses.

# Where can I get a balance of my organizations account?

The CCSA Office.

# Where can I get the account number of my organization?

The CCSA Office.

# How can I get SOAP funding?

Submit an application at the following address one month prior to the event. SOAP may fund up to \$250 for your program: <a href="wpi.edu/+SAO/Orgs/soap.html">wpi.edu/+SAO/Orgs/soap.html</a>.

# What is the Speaker's Fund and what are the requirements?

The Speaker's fund allows for the campus community to bring speakers to WPI. More detailed requirements are located on our website <a href="wpi.edu/+SAO/Orgs/Forms/SSF-form.html">wpi.edu/+SAO/Orgs/Forms/SSF-form.html</a>.

# Where can I get a contract?

A contract may be drafted from the company/performer. WPI also has a contract that we use. This may be obtained in the CCSA Office.

# How can I get a check this week for fundraiser supplies that we need next week?

Reimbursement checks are issued after the SAO receives all receipts and check requests. There is a two to four week grace period for checks to be processed.

## Is the office open during break?

The office is open all year including breaks from 8:00 a.m. -5:00 p.m. Monday through Friday with the exception of campus wide observed holidays and during the summer the office closes at 4:30p.m.

# Where can I purchase tickets for the show that's coming soon?

Tickets for a show/event may be purchased through a student group. For example, if SocComm has an event, tickets will be sold out of their office, or where publicity specifies. You may also email tickets@wpi.edu if your organization would like printed tickets for your event.

# Can I get a poster printed in this office?

Posters may be printed through SocComm for \$3.00 each in color. You may email <u>posters@wpi.edu</u> with further questions.

# How do I make a deposit for my organization?

Bring the correct form (wpi.edu/Admin/Acc/ Staff/Forms/cashreceipts.pdf) and a deposit to the CCSA Office, so we can put a copy in your file. Then you'll carry your deposit to the Accounting Office.

# Where can I make copies?

Copies can be made in the Student Organization lounge with a copier code. Only students affiliated with organizations that have a copier code may utilize this service. Copies can only be made for your organization, not for personal use.

# How can I get copy paper for the copier in the Student Organization Lounge?

The CCSA Office has paper for the copier.

# Can you check whether or not a bill submitted for payment has been paid?

Yes, the CCSA may check on this for you. Please allow 2 weeks for the processing of checks.

# How can I contact all the presidents of the organizations and clubs?

The <u>clubpresidents@wpi.edu</u> is moderated by the CCSA. You may send an email either to cgirouard@wpi.edu or to the listserv itself.

Any additional questions? E-mail us at <u>CCSAinfo@wpi.edu</u> and we will return an answer as soon as possible.



Participation in out of class activities is considered a significant element of the student experience at WPI. Student organizations provide the campus community with activities, programs, and resources that enhance the quality of student life. WPI encourages and promotes participation in these organizations as a way for students to develop life skills for achieving their goals.

To view a current list of the student clubs and organizations at WPI, you can go to our website at: http://www.wpi.edu/Admin/SAO/Orgs/clubs.html.

# Student Organizations

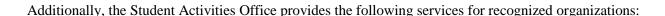
# **Recognition of Organizations**

The process of student organization recognition is vital to accurately monitor and assess the status of all student groups. The recognition process is intended to clarify the rights, privileges, and responsibilities of student organizations. All student organizations wishing to be recognized by WPI are required to complete this process.

# Why Become a Recognized Student Organization?

Some of the benefits to which recognized student organizations are entitled include the ability to:

- Schedule and use WPI facilities:
- Apply for funds from SGA and/or other campus sources;
- Associate WPI's name with that of the organization;
- Sponsor campus programs and activities;
- Be included in WPI publications when appropriate;
- Have a campus mailbox in Student Activities Office:
- Have a WPI account with the Business Office:
- Have a myWPI community group;
- Apply for a copier code for the copy machine in the Student Organization Lounge on the third floor of the Campus Center;
- Apply for a student organization file cabinet or locker in the Student Organization Lounge;
- Obtain assistance from the Student Activities Office in matters of finance, programming, liability, etc.



- Information on recognized organizations and the names of their officers and advisors to interested students, organizations, and departments. Information is updated on a continual basis.
- All recognized clubs and organizations should have a mailbox in the Student Activities Office. Individuals wishing to contact just one organization, or all of them through a bulk mailing, are permitted to leave mail in the boxes.
- For organizations sponsoring fundraisers or recruitment programs, the Events Office provides tables for use in public areas.
- The Student Activities staff is available to answer questions regarding an organization's financial paperwork and to research current transactions. All the forms necessary to process account transactions are available on our website at <a href="http://www.wpi.edu/Admin/Acc/SAO">http://www.wpi.edu/Admin/Acc/SAO</a>.
- The staff is willing help an organization brainstorm fundraising or programming ideas.
- Recognized organizations may have posters and flyers placed on the Campus Center bulletin boards to help publicize their events; however they must get approved by the Campus Center and Events Offices.



# The Student Organization Council (SOC)

All requests by student groups to become recognized, or to remain recognized, will be coordinated by the Student Organization Council (SOC). The SOC will be comprised of:

- Two (2) representatives from the Department of Physical Education and Athletics;
- Two (2) representatives from the Student Activities Office;
- One (1) representative from the faculty;
- One (1) representative from the Graduate Student Government;
- And three (3) student representatives from Student Government Association.

The Vice President for Student Affairs will appoint the representatives from Athletics and the Student Activities Office and appoint the chairperson for the Council. Faculty governance will appoint the faculty member. The Graduate Student Government and the Student Government Association will appoint their respective representatives. A quorum of 4 is required at any meeting.

The SOC will conduct periodic assessments of each organization to assist recognized student organizations in evaluating their organizational development and activities. Through organization self-assessment, SOC assessment, and recommendations for continued success, organizations will receive guidance and support for achieving their organizational goals.

# **Starting a New Organization**

Despite the wide variety of activities available at Worcester Polytechnic Institute, students may want to form a new organization.

All student groups requesting official recognition from WPI must:

- Abide by the college's affirmative action policy;
- Disclose if they are known by any other name, or are affiliated with any other organizations;
- Permit members to disassociate at any time, provided that any financial obligations to the organization have been met;
- Abide by all federal, state and local laws, and college policies;
- Include a statement ensuring they will not practice any physically or psychologically abusive hazing behaviors either intentionally or unintentionally;
- Have the support of other students through a signed petition containing the names and school addresses of at least 50 full-time WPI students;
- Have an advisor Non-Greek organizations must have an advisor who is a full time member of the WPI faculty, staff or administration;
- Outline a purpose that is consistent with the mission of the university;
- Not present undue risk to participants or to the university;
- And, agree to participate in a periodic assessment process.

If the group is Greek-affiliated, it must also meet IFC or Panhellenic Council established criteria. If the group is affiliated with any other regional or national organization, it must meet both the organization's criteria, as well as the university's criteria.

# Step One: Organizing

Student groups should submit a letter of intent to organize signed by the student contact and the organization's intended advisor, via the Student Activities Office, to the Student Organization Council (SOC). Upon receipt of the letter of intent to organize, the SOC will permit the

organization to conduct limited organization business on campus. Over a three month period, groups may post notices on campus bulletin boards, reserve tables in public areas a total of five times and reserve meeting rooms three times. Groups may meet for organizing purposes only and may not sponsor any speakers from off-campus or any other programs. Students are encouraged to meet with the Chairperson of the Student Organization Council (SOC) to learn more about the recognition process.

# Step Two: Requesting Recognition

To complete the recognition process, the group must submit the following materials prior to the SOC's semi-annual recognition meeting:

- A copy of the organization's letter of intent to organize;
- A complete recognition application; (See below)
- The names and school addresses of 50 full-time students who support the establishment of the organization at WPI;
- A completed Anti-Hazing Policy form;
- A constitution prepared in accordance with the sample constitution format outlined later in this policy;
- A one paragraph description of the organization for potential use in college publications.

The application for recognition is now available online at: <a href="http://www.wpi.edu/Admin/SAO/Orgs/forms.html">http://www.wpi.edu/Admin/SAO/Orgs/forms.html</a>

# Step Three: Review & Approval

Once the above materials have been received, the request will be forwarded to the Student Organization Council (SOC). The SOC Chairperson will contact the organization to prepare a 5 minute presentation giving a description of the organization, why it should be recognized, and how this organization will benefit the students of WPI. The SOC will review and make a final decision. The SOC has a right to recommend review by our risk management department regarding safety and security prior to making a final decision.

# **Annual Renewal of Recognition**

All recognized student organizations must have on file within the Student Activities Office the following:

- A <u>current constitution</u> for the organization, or local bylaws in the case of National Organizations (with revision/review dates, and minimum review on a yearly basis);
- A completed Anti-Hazing Policy form;
- An updated list of club officers and the name of the advisor;
- Any other requirements as imposed by the department of Physical Education and Athletics, the WPI Greek system and the regional or national organization.

Annual forms for renewal can be found on our website at: <a href="http://www.wpi.edu/Admin/SAO/Orgs/forms.html">http://www.wpi.edu/Admin/SAO/Orgs/forms.html</a>

# **Responsibilities of Recognized Student Organizations**

Recognized student organizations are expected:

• To renew recognition annually by submitting the annual forms.

- To use the WPI Business Office for the administration of all college-approved and supplied funds and funds raised on campus.
- To have a current constitution on file with the Student Activities Office.
- To have only matriculated WPI students, faculty, and staff as its members.
- To have full-time students, in good academic standing, as its officers.
- To maintain a current list of officers with the Student Activities Office.
- To adhere to all federal, state and local laws, and college policies.
- To ensure that its membership will not practice any physical or psychologically abusive behaviors, either intentionally or unintentionally.

# **Judicial Process & Recognized Student Organizations**

Complaints regarding the actions of recognized student organizations may be submitted to the Campus Hearing Board. The same judicial process will be used for recognized student organizations as for individual students.

A complaint may be filed against a recognized student organization when a violation of the Student Code of Conduct occurs as a result of an incident by one or more members of an organization during an activity that is sanctioned or supported by the organization. For more information, please visit the Student Life Office website at <a href="wpi.edu/Admin/SL/">wpi.edu/Admin/SL/</a>.

# **Organization Constitutions**

Constitutions and bylaws serve as the guiding basis for your organization. Here are some hints to help write your governing document:

- Keep it simple avoid confusing terminology.
- Present a draft of the document to the Student Activities Office staff for review and suggestions.
- Write carefully amendments to the constitution are changes directly to the body of the document (changes are more difficult to make than Bylaws).
- Bylaws are the specific day to day rules which are not included in the Constitution, but due to their importance, cannot be changed without using formal procedure.

A sample can be found on our website at <a href="http://www.wpi.edu/Images/CMS/SAO/Constitution">http://www.wpi.edu/Images/CMS/SAO/Constitution</a> Format.pdf or in the Student Activities Office.

# **Student Organization Mail Service**

All recognized student organizations are eligible to have a mailbox located in the Student Activities Office and are required to be emptied weekly by an officer of the organization. The box receives U.S. Postal Service mail, campus mail, and commercial flyers. Organization mailboxes do not have box numbers. Correspondence to your organization mailbox should be addressed as follows:

(Organization Name) c/o Student Activities Office 100 Institute Road Worcester, MA 01609-2280 Attn: (Club Officer)

# **Packages**

Organizations receiving packages at the organization mailbox address will receive an email. Organizations wishing to send packages (up to 50 pounds per package) may bring the wrapped package to the Student Activities Office for help in processing. A UPS billing form (available in the Student Activities Office) will need to be completed for each package shipped. "Ship to" addresses must include a street address. UPS will not deliver to post office box numbers.

# **Organizational Mailings**

Organizations planning to send meeting/event notices, newsletters, etc. to their membership through on-campus mail must adhere to the following guidelines:

- The member's first and last name and WPI box number must appear on the outside of the mail in legible print.
- Large-mailings (i.e., over five pieces) must be placed in ascending order by box number and secured with a rubber band or paper clip.
- Notices, newsletters, etc. must measure at least 4" x 5 1/2" and be no larger than 11" x 17".
- Mailings to faculty, staff, or administration should include the person's full name and department (not the building).
- Mailings to student organizations should be done directly in the Student Activities Office.

Organizations planning to do a bulk-mailing to off-campus addresses (e.g., alumni, friends, etc.) should place the mail in ascending order by zip-code. The entire mailing should be placed in a box or mailing tray (available in the Campus Center Mailroom). All pieces must be identical and include the "Bulk Rate" imprint. A sample with no address should be included. Bulk mailings must have a minimum of 200 pieces. The organization should then complete a mailing work order form, available in the Student Activities Office, and deliver the mailing to the Campus Center Mailroom. We suggest that you contact the mail room staff for specific instructions and details **in advance** of mailing.

## Labels

Student organizations requiring mailing labels for a particular student population may request them through the Registrar's Office. The request will require the signature of the administrator responsible for your student organization account. Labels for faculty, staff, and administration may be requested through Duplicating Services in Boynton Hall.

# **Requesting Web Space**

One of the many privileges of being a recognized student organization is the ability to request web space on the Student Activities website. If your organization is interested in learning more about creating or connecting a website for your organization, contact the Student Activities Office at 508-831-5291 or by email at <a href="mailto:sao@wpi.edu">sao@wpi.edu</a>.

# The Role of Your Advisor

Each organization is required to have an advisor who is a full-time member of the WPI faculty, staff or administration. Advisor manuals are a separate publication and are available in the Student Activities Office. Please stop by and pick a manual up for your advisor if he/she has not done so already.

The advisor is needed to help the group meet its stated goals. The first step for any advisor is to review the organization's constitution in order to clearly understand the group's purpose; knowing this will help the advisor determine how she or he can best assist the group. The officers of the organization should meet with the advisor to discuss their specific roles and responsibilities.

# Topics to be discussed should include:

# Meetings

- Will the advisor attend all meetings of the organization?
- Will the advisor meet separately with the officers to discuss issues between regular meetings?
- Will the advisor be consulted regarding agenda items or meeting planning?
- Should the advisor evaluate the meeting with the president?

# **Planning**

- Do officers expect the advisor to assist with activity and meeting planning?
- Should the advisor be expected to know campus policies and procedures?
- Will the advisor be expected to help the group find financial resources or meeting space?
- What is the role of the advisor in determining the purposes of the group or objectives for the year?

# **Programs**

- Is the advisor expected to help with programming?
- Is the advisor expected to attend all programs?

## **Problems**

• Is the advisor expected to help resolve problems in the group or mediate personality conflicts?

## Training

- Is the advisor expected to train officers in their roles?
- Do officers expect the advisor to provide feedback regarding their leadership?
- If yes, how should this be done?



## Administrative

- Is the advisor expected to maintain records for the group?
- Is the advisor expected to provide administrative support for the new group (such as getting things typed or mailed, handling contracts or negotiating contracts with outside persons, making reservations, etc.)?

Please note that none of these responsibilities are implied for the advisor; the previous list is simply intended to highlight some of the common issues of advisor/officer responsibilities. The most important aspect of the advising relationship is that of mutual agreement about the role of the advisor. This agreement cannot be assumed -- it must be discussed and negotiated.

- Be informed of the purpose and programs of the organization;
- Assist the organization in its attempt to fulfill its goals;
- Attend meetings and events scheduled/sponsored by the organization;
- Discuss and clarify the role of an advisor with group members to avoid problems due to misunderstandings regarding roles and responsibilities;
- Maintain familiarity with the policies and procedures of WPI;
- Be available to club officers of the organizations on a regular basis;
- Be reasonably available to members to advise and assist in organizational issues or problems;
- Provide advice and counsel on proper procedures and guidance to avoid conduct that would discredit WPI or the organization;
- Encourage members to gain useful and valuable experience from their participation in activities, but not at the expense of their academic responsibilities;
- Encourage dialogue between the organization and the university (specifically the Student Activities Office). Recognize the limitations and abilities of students and yourself.

The above is adapted from "Organization Advisor Manual," California State Polytechnic University, and "The Beacon: A Guide for Student Leaders Organization Advisors," Middlesex Community College.

# **Clubs and Organizations**

Below is a list of all the current recognized clubs and organizations at Worcester Polytechnic Institute. If you are interested in joining or contacting one of these organizations, contact the Student Activities Office at 508-831-5291 or by email at sao@wpi.edu.

# **Honorary Societies**

Alpha Psi Omega (drama)

Arnold Air Society (AFROTC)

Chi Epsilon (civil engineering)

Epsilon Upsilon Pi (management)

Eta Kappa Nu (electrical engineering)

Omega Chi Epsilon (chemical engineering)

Order of Omega (Greek)

Phi Lambda Upsilon (chemical engineering)

Phi Sigma Society (biology)

Pi Delta Epsilon (media)

Pi Mu Epsilon (mathematics)

Pi Tau Sigma (mechanical engineering)

Rho Lambda (National Leadership Recognition

for Sororities)

Salamander Honorary Fire Protection

**Engineering Society** 

Sigma Pi Sigma (physics)

Skull (senior honor society)

Tau Beta Pi (engineering)

Upsilon Pi Epsilon (computer science)

# Media, Publications and Literature

Campus Radio Association (WWPI 90.1FM)

Philosophical Society

Photography Club

Society for Medieval Arts and Sciences

The Peddler

The Towers

WPI Writers Group

# **Club Sports**

Alpine Ski Team

**Badminton Club** 

Baseball

Cheerleaders

Cycling Club

Fencing Club

Freestyle Wrestling Club

Golf Club

Ice Hockey Club

Indoor Soccer Club

Karate Club

Lacrosse Club - Men

Lacrosse Club - Women

Roller Hockey Club

Rugby Club - Men

Rugby Club- Women

Soccer Club - Men

Tennis Club - Men Tennis Club - Women

Ultimate Frisbee Club

Volleyball - Men

# **Fitness and Outdoor**

Outing Club

Pershing Rifles

Racquetball Club

Sailing Club

Scuba Club

Society of Martial Artists (SOMA)

WPI Disc Golf Club

## **Cultural**

Black Student Union

Chinese Student Association (CSA)

Chinese Students & Scholars Association

Deutschklub (German Club)

Hellenic Student Association

Hispanic and Caribbean Student Association

Indian Student Organization (ISO)

Korean Student Association

Muslim Student Association

National Society of Black Engineers (NSBE)

Society of Hispanic Professional Engineers

(SHPE)

Turkish Student Association

Vietnamese Student Association (VSA)

# **Religious**

Christian Bible Fellowship (CBF)

Hillel

Newman Club

Unitarian Universalist Campus Fellowship

# **Fraternities & Sororities**

Alpha Chi Rho Fraternity

Alpha Gamma Delta Sorority

Alpha Tau Omega Fraternity

Alpha Xi Delta Sorority

Lambda Chi Alpha Fraternity

Phi Gamma Delta Fraternity

Phi Sigma Kappa Fraternity

Phi Kappa Theta

Phi Sigma Sigma Sorority

Sigma Alpha Epsilon Fraternity

Sigma Phi Epsilon Fraternity

Sigma Pi Fraternity

Tau Kappa Epsilon Fraternity

Theta Chi Fraternity Zeta Psi Fraternity

# **Music and Performing Arts**

African Percussion & Dance Ensemble

Alden Voices

Ballroom Dance Team

Brass Ensemble

Concert Band

**Empty Set Improve Group** 

Guerilla Improv

Interstate 8

JazzGroup

Kilroy Sketch Comedy

Masque (theatre)

Men's Glee Club

Pep Band

Simple Harmonic Motion

Social Dance Club

Symphonic Association

Technichords - No Fella A Cappella

Trombone Ensemble

Urban Dance Club

WPI Dance Team

## **Professional Societies**

**Actuarial Society** 

American Institute of Aeronautics and

Astronautics (AIAA)

American Institute of Chemical Engineers

(AIChE)

American Society of Civil Engineers

American Society of Mechanical Engineering (ASME)

Association of Computing Machinery (ACM)

Biomedical Engineering Society (BMES)

Institute of Electrical and Electronic Engineers (IEEE)

International Society for Pharmaceutical

Engineering (ISPE)

Management Information Systems Association (MISA)

Mu Sigma Delta (Pre-Health Society)

National Society of Black Engineers

Society of BioMaterials

Society of Fire Protection Engineers (SFPE)

Society of Hispanic Professional Engineers

(SHPE)

Society of Industrial Applied Mathematics

(SIAM)

Society of Physics Students (SPS)

Society of Women Engineers (SWE)

System Dynamics Club

Women in Computer Science (WICS)

Women in Electrical & Computer Engineering (WECE)

# **Professional/Career Development**

Actuarial Club

Genius! Entrepreneurship Club

**Skeptical Chemists** 

System Dynamics Club

Toastmasters Club

# Governance

Graduate Student Government (GSG)

Interfraternity Council (IFC)

International Student Council (ISC)

Panhellenic Council

Student Government Association (SGA)

# **Programming**

Lens & Lights Club (LnL)

Social Committee (SocComm)

Student Alumni Society (SAS)

**Student Comedy Productions** 

# Science, Technology and Gaming

Baja SAE Team

FIRST Robotics Team 190

Formula SAE Team

Free Software Association

Game Development Club

**Motor Sports** 

Recording Club

Science Fiction Society (SFS)

Wireless Association

WPI Astronomical Society (WAS)

WPI Chess Club

WPI Rubik's Cube Club

# **Societal Awareness & Community Service**

Alpha Phi Omega (APO)

Amnesty International

Bisexual, Lesbian, and Gay Alliance (BiLAGA)

Emergency Medical Services (EMS)

**Engineers Without Borders** 

**Exploradreams** 

Global Awareness of Env. Act. (GAEA)

Habitat for Humanity of Greater Worcester

Legal and Social Issues Group

Standard Rotaract Club

Student Pugwash

WPI College Democrats

# **Questions or concerns? Contact the Student Activities Office Staff**

For general information contact:

Student Activities Office Phone: 508-831-5291 Email: sao@wpi.edu

Emily Perlow Associate Director of Student Activities and Greek Life eperlow@wpi.edu

Christine Girouard Assistant Director of Student Activities cgirouard@wpi.edu

Jay Sparling Graduate Assistant (SGA, Community Service) jsparling@wpi.edu

Louise Campbell Administrative Assistant to Student Activities lpcamp@wpi.edu

# **Other Important Numbers**

Events Office Catering 508-831-5613 508-831-5253

Printing Services Campus Police (non emergency) 508-831-5571 508-831-5433

# **Calendar of Events**

Date	Event	Location	Time
August 24-27	New Student Orientation	Various Locations	All Day
August 27	Student Activities Fair	Quad	3:15-5:15pm
August 28	First Day of A Term	Various Locations	All Day
August 28 <sup>th</sup>	Volunteer Fair	Odeum	3-6pm
September 1	Labor Day - No Classes	Various Locations	All Day
September 4	Community Service Fair	Odeum, Campus	3:30-6pm
		Center	
September 6	Shrewsbury Shuffle	Shrewsbury Street	12-3pm
September 6	Work on Worcester	TBA	9am-Noon
			and 1-4pm
September 13	Worcester Pride	Various Locations	10am-1pm
September 19-21	Parents Weekend	Various Locations	All Day
October 1	Deadline for Organization Registration	Student Activities	8am-5pm
	and Anti-Hazing Forms	Office, Room 327,	
		Campus Center	
October 1-4	Greek Week	Various Locations	All Day
October 3-4	Homecoming	Various Locations	All Day
October 28 <sup>th</sup>	First Day of B Term	Various Locations	All Day
November 17	Giving Tree Begins	Student Activities	All Day
November 24	Hunger Banquet	Odeum A & B	4-8pm
November 27-30	Thanksgiving Break – No Classes	Various Locations	All Day
December 8-10	Holiday Cards for Troops	Campus Center	11am-3pm
December 6-13 <sup>th</sup>	Winter Carnival	Various Locations	TBD
January 15	First Day of C Term	Various Locations	All Day
January 19	Martin Luther King Day – No Classes	Various Locations	All Day
February 7	GAC Leadership Conference	TBA	TBA
February 8	Consortium Leadership Conference	TBD	TBD
February 19 <sup>th</sup>	Deadline for Organization Registration	Student Activities	8am-5pm
	and Anti Hazing Forms	Office, Room 327,	
F.1 10		Campus Center	411.75
February 19	Academic Advising Day – No Classes	Various Locations	All Day
March 16	First Day of D Term	Various Locations	All Day
April 6-9	White Ribbon Campaign	Various Locations	All Day
April 8	GAC Awards	TBA	TBA
April 9	Crimson and Gray Awards	Odem A & B	4-7pm
April 20	Patriots Day – No Classes	Various Locations	All Day
April 23	Project Presentation Day – No Classes	Various Locations	All Day
April 26	Worcester City Clean Up	Odeum A& B	1-4pm
May 16	Commencement	Quad	TBD

For the most up to date information regarding the Student Activities Office calendar or to see just a few of the programs taking place on campus, visit the SAO website at <a href="http://www.wpi.edu/Admin/SAO/calendar.html">http://www.wpi.edu/Admin/SAO/calendar.html</a>.



The following section details the policies and procedures that govern WPI clubs and organizations. Please read this section carefully as all clubs and organizations should adhere to these expectations.

# Policies and Procedures

# The following are WPI Policies Governing Student Organizations:

# **Anti-Hazing Policy**

In December 1987, the anti-hazing legislation, Chapter 269, Sections 17 through 19, was amended by the Legislature in Chapter 665 of the Acts of 1987. The amendment increases the criminal penalties for hazing infractions and alters the manner in which institutions notify individuals of the law. *Specifically, WPI is required to inform groups, teams or organizations of the provisions of M.G.L. Chapter 269, Section 17, 18 and 19.* 

A club officer must read Sections 17, 18, and 19 of this law and pass out a copy to each member of the organization. A copy of the form is located in Appendix D.

Once you have shared the information with your organization:

- Go to <a href="http://www.wpi.edu/Admin/SAO/Orgs/forms.html">http://www.wpi.edu/Admin/SAO/Orgs/forms.html</a> and print out the anti-hazing act signature page and complete the bottom portion.
- Go to <a href="http://www.wpi.edu/Admin/SAO/Orgs/forms.html">http://www.wpi.edu/Admin/SAO/Orgs/forms.html</a> and print out the club signature sheet and have all of your members sign it.
- Return both forms to the Student Activities Office. These materials must be submitted on a yearly basis to the Student Activities Office for recognition purposes.

Not only is hazing against the law, but it is a practice which diminishes the integrity of individuals and their organizations. Hazing is clearly defined with the sections of the law, and has no place in our society, particularly at an institution of higher education.

WPI is committed to emphasizing that all organization activities are made constructive, educational and safe. Therefore, in support of the university's commitment to the mental, emotional, and physical well-being of every student, it is the policy of the University and the Commonwealth of Massachusetts that "hazing" in any form be prohibited, and its practices in any fashion be condemned.

# **WPI Judicial Policies**

Please review the policies listed at wpi.edu/Pubs/Policies/Judicial.

The WPI Campus Judicial System shall have jurisdiction over cases involving student organizations, clubs, sports teams, fraternities and sororities. Any group or organization may be held accountable for the actions of any of its members if the violation of this Code of Conduct is in any way related to the group or organization. Group misconduct need not be officially approved by the entire membership in order to be considered grounds for possible disciplinary action against the group. There is no minimum number of group members who must be involved in an incident before disciplinary action may be taken against the entire group. In some instances, the conduct of a single member may provide sufficient grounds for action against the entire group. An appropriate test to determine whether a group may be held accountable for the conduct of individuals is to ask whether it is likely that the individuals would have been involved in the incident if they were not members of the group or, if by group action, the incident was encouraged, fostered, or might have been prevented.

# Food Service on Campus

Chartwells is the contracted food service provider for the entire WPI Community and must be used for all functions where food and beverages are served. All organizations who wish to order food for on campus events must do so through Chartwells.

# **Publicity Policies on Campus or the Campus Center**

# **Chalking Policies**

Recognized student organizations may advertise events of campus-wide interest with chalk on outside areas only; specifically sidewalks and the Quad brick walkway. Campus-wide events include any event open to all students as well as fraternity and sorority events. Each organization is responsible for removing the chalk within one week after the event takes place (if weather has not removed the chalk). All chalk used must be washable "sidewalk" chalk, rather than classroom board chalk.

# **No Chalking Areas**

Specific areas are designated as No Chalking Areas. They are:

- Any vertical surfaces, such as the side of buildings and light poles
- Trash cans
- Steps
- The seal on the Quad
- Any sitting area (wood or brick)

# **Cleaning**

Groups will be charged for cleaning if:

- Chalking occurs on in any prohibited areas
- Advertising for something other than a campus-wide event occurs
- The chalk is not removed within one week after event occurs
- The minimum charge for any cleaning will be \$35 for each separate location

These chalking guidelines were created as a result of students' discontent with excessive chalking and the detrimental effect it had on the appearance of the campus.

# **Academic Buildings**

If you would like to publicize in the Academic Buildings, you must post on bulletin boards that are indicated as general use only.

# **Residence Halls**

Any organization or individual(s) wishing to post an announcement in any residential unit at WPI must first have the announcement approved by the Residential Services professional staff. Announcements are defined as, but not limited to, posters, pamphlets, brochures, and door tags. All announcements must display the name of the organization hosting the event, and 41 copies are needed to distribute to all staff members. This is the only approved method for distribution of announcements in the residential buildings. In addition, no announcements may be posted on any fire doors, exterior doors, or windows. All materials posted in these areas will be removed by the custodial staff.

# **Dining Halls**

If you would like to place table tents/quarter sheets or other publicity in the dining hall, you must receive approval by Dining Services either in Morgan or Founders Hall, as well as the Campus Center Food Court depending on the location.

# **Campus Center**

If you would like to publicize within the Campus Center, you may do so by getting your poster approved by the Campus Center Administrative Office located on the second floor next to the bookstore. If your

organization has an original idea to publicize within the Campus Center, you must meet with the Director, Jim McLaughlin, <u>jimmcl@wpi.edu</u> for approval. Posters are not allowed on glasses, doors, painted walls, or the exterior of the building.

The portable easels within the Campus Center are for event promotion and activities only, not for organization meetings.

# **Table Sitting**

The Campus Center has tables for student organization use. You may reserve one of these tables in the Campus Center with Kim Wykes at <a href="maybed-www.edu">kwykes@wwi.edu</a> in the Campus Center Administrative Office. Reservations are based on a first come first serve basis.

If you are placing a flyer on campus please make sure that the following information is provided on the flyer:

- Name of Event
- Location/Date/Time
- Cost
- Open to all Students
- Name of Sponsor

\*If you are not sure whether or not your publicity complies with WPI policies please visit our office to further discuss.

# What is Copyright?

Copyright is a form of legal protection for authors of original works, including literary, dramatic, musical, artistic, and other intellectual products. Publication is not essential for copyright protection, nor is the well known symbol of the encircled "c". Section 106 of the Copyright Act (90 Stat 2541) generally gives the owner of copyright the **exclusive** right to do and to authorize others to do the following:

- 1. **Reproduce** copies of the work.
- 2. **Prepare derivative works** based on the copyrighted work.
- 3. **Distribute** copies of the work by sale, rental, lease, or lending.
- 4. **Publicly perform** the work (if it is a literary, musical, dramatic, or choreographic work or a pantomime, motion picture or audiovisual work).
- 5. **Publicly display** the work (if it is a literary, musical, dramatic, choreographic, sculptural, graphic, or pictorial work -- including the individual images of a film -- or a pantomime).

The copyright owner retains these rights even when the work itself belongs to someone else. However, the rights are not absolute. They are subject to both "Fair Use" limitations, which apply to all media, and medium-specific limitations.

# Video Cassette and Videodisc Copyright Policy

WPI recognizes and complies with the Federal Copyright Act which governs how copyrighted materials, such as movies, may be used. Pre-recorded video cassettes and videodiscs are for **home use only. Public performances are not allowed by law.** "Even performances in 'semi-public' places such as clubs, lodges, factories, summer camps, and schools are 'public performances' subject to copyright control" (Senate

<sup>\*</sup>All flyers and publicity materials must be removed immediately following the conclusion of your event.

Report No. 94-473,p60; House Report No. 94-1476,p64) For the College that includes residence hall lounges, any room in the Campus Center or academic building (when not part of a class), etc.

It is a violation of Federal law to exhibit pre-recorded video cassettes and videodiscs beyond the scope of your private room or apartment - regardless of whether or not admission is charged. **Ownership of a pre-recorded video cassette or videodisc does not constitute ownership of a copyright.** Willful infringement for commercial or financial gain is a federal crime punishable as a misdemeanor, carrying a maximum sentence of up to one year in jail and/or a \$100,000 fine. Even inadvertent infringers are subject to substantial civil damages, ranging from \$500 to \$20,000 for each illegal showing.

If your student organization wishes to show a video cassette or videodisc on campus, you must obtain a Public Performance License. A fee is attached to each license. These fees vary according to size of audience, what movie you choose, and how the video is shown. For more information, contact: Swank Motion Pictures, 800.876.5577 or <a href="mailto:swank.com">swank.com</a>; Criterion Pictures, 800.890.9494 or <a href="mailto:criterionpicusa.com">criterionpicusa.com</a>; or the Student Activities Office at <a href="mailto:sao@wpi.edu">sao@wpi.edu</a> or 508.831.5291.

(Adapted from The College of William and Mary Copyright Policy <a href="http://www.wm.edu/studentactivities/policy/video.php">http://www.wm.edu/studentactivities/policy/video.php</a>)

# **Printed Materials**

Copyright and trademark rules should be observed by all student organizations. Graphics, video, audio or text created by another person may not be placed on an organization webpage, advertising materials, etc. without demonstrated permission of the artist or author.

# **How to Reserve an Event in the Campus Center**

Please see Appendix C.

# **Contract Policy**

If your organization is booking an artist to perform, or if your organization is requesting services from a particular vendor, then a contract and signature are required by the Student Activities Office.

# **Identity Policy**

WPI has an extensive Identity Policy which details where and when the WPI logo can appear. Please refer to the Identity Policy whenever you plan to use Worcester Polytechnic Institute or WPI on any items. The full Identity Policy can found at <a href="wpi.edu/Pubs/Policies/Identity/Guide/">wpi.edu/Pubs/Policies/Identity/Guide/</a>.

# **Campus Activities and Programs: Alcohol Service at Student Functions**

Student organizations may request to have alcohol present at an official organization function. The following guidelines must be followed before alcohol may be served:

- 1. All laws of the Commonwealth of Massachusetts must be observed.
- 2. All alcoholic beverages are to be obtained and served by Chartwells, Inc. (WPI Dining Services). WPI will only allow beer and wine to be served at student functions.
- 3. During the week, alcoholic beverages may only be served after 4:00p.m.
- 4. No persons under 21 years of age and without proper identification may be in any area where alcoholic beverages are served and/or consumed.
- 5. If a student organization would like to request alcoholic beverages be served at their event, the president of the organization must meet with the Director of Campus Center and Student Activities in order to discuss the proposed activity and details associated with alcoholic beverage service. All events where alcoholic beverages are consumed must be coordinated by the Events

- Coordinator of the university with approval, as appropriate, by a member of the President's Cabinet.
- 6. Non-alcoholic beverages must be available at the same price or less than the price of the alcoholic beverages, and must be prominently featured.
- 7. A reasonable portion of the budget for the event must be designated for the purchase of food items.
- 8. No event may include any form of drinking contest in its activities or promotion.
- 9. "All you can drink" events, at which an unlimited amount of alcohol may be consumed for one fee, or special price promotions, are not permitted.
- 10. WPI Campus Police must be present at all times during the event. The cost of the Campus Police is the sole responsibility of the sponsoring organization.
- 11. Alcohol may not be used at membership recruitment functions by any student organization, nor may alcohol be used as an inducement to participate in a campus event.
- 12. Alcohol may not be served, consumed, or otherwise be present at club sports events.
- 13. Signs in which alcohol is the main focus of the advertising is not permitted in any area of campus.
- 14. WPI accepts no responsibility through the adoption of these guidelines for the behavior of guests at these functions. This responsibility rests solely with the sponsoring individual/organization. WPI, through the Events Coordinator and Chartwells, Inc., reserve the right to schedule and manage each function in the best interests of both organizations.

During the academic year, residence hall students are expected to adhere to the Residence Hall Alcohol Policy. To review the policy and learn about the application process go to our website at wpi.edu/Admin/SAO/Policies/programs.html.

# **Travel Policy**

## GUIDELINES FOR TRAVEL FOR STUDENT ORGANIZATIONS

Only WPI students are permitted to be members in WPI organizations. Mass Academy students
are not permitted to attend WPI sponsored trips without a parent or MA Academy faculty
chaperone.

## **GENERAL GUIDELINES FOR ACTIVITIES:**

- All meetings, trips and activities must be pre-planned and carefully organized by the
  organization's officers or other designated members. Activities that involve inherent risk or have
  caused undo risk of injury to participants in the past must be reported to and cleared by the
  Director of the Campus Center and Student Activities or his/her designee.
- An activity is considered sponsored or endorsed by a club, organization or department if:
  - O University funds are used or intended to be used for reimbursement;
  - The event is advertised as a club, organization, or department event;
  - o Plans for the activity are made by the club, organization, or department;
  - o Transportation is coordinated by the club, organization, or department;
  - o Travel is undertaken in university leased vehicles.
- All activities of the organization must be consistent with the mission of the group. All activities will adhere to WPI polices and practices. WPI does not permit, endorse or recognize any activities, communications or publications that are illicit or illegal in nature. Further, WPI does not permit hazing, sexual harassment or any other form of physical or mental abuse. All students

are bound by the WPI Code of Student Conduct when participating in organization or university sponsored activities.

• All organizations are expected to enlist a member of the WPI faculty, staff or administration as an advisor. It is strongly suggested and encouraged that an advisor be in attendance at all meetings and activities unless deemed unnecessary by the Director of the Campus Center and Student Activities or his/her designee. For any activities that are a) outside a 120 mile radius of Worcester; and/or b) extend overnight, an advisor is required to be in attendance unless prior written approval is given by the Director of the Campus Center and Student Activities, or his/her designee, in advance of the activity.

## **GENERAL TRAVEL GUIDELINES:**

• **Registration:** Trips that require payment from University funds must be registered through the Student Activities Office. Failure to register the event will result in the inability to access funds for the event or personal reimbursement.

Any event that includes travel must be registered at least three weeks prior to the scheduled event if the event meets the following criteria: 1) travel extends outside of a 120 mile radius; 2) the activity is overnight; 3) hired or rented transportation is used in the travel to and from the activity; 4) a contract is required; or the trip exceeds 20 participants. An event that involves travel that does not meet this criteria must be registered one week in advance.

- **Driver Eligibility:** Drivers for student organization travel must be members of the organization who are currently enrolled as WPI students, or WPI staff or faculty. Organizations requesting permission for other drivers (e.g., volunteer coaches) must receive approval from the Director of PERA Student Programs for a club sport organization or a professional staff member in the Campus Center and Student Activities Department for any other organization. All drivers must have a valid driver's license.
- **Personal Autos:** The use of personal autos for travel to and from activities or meetings is discouraged by WPI due to the inherent dangers of general automobile travel and the additional risks represented by transporting others in a personally owned auto. However, WPI realizes that it is unrealistic in many cases for small groups of students to rent or lease an auto, or charter commercial transportation. As such, personal autos are often the only reasonable and affordable mode of transportation.

When individuals use their own vehicle to transport themselves and/or others, they do so at their own risk. WPI is in no manner responsible or liable for any injury to the driver or passengers in the driver's automobile. The individual's personal auto policy must respond to any bodily injury claims and expenses to the driver and passengers in the auto, as well as any third party that is injured. As such, it is important for the driver to verify that they have insurance and that the limits of liability protection against such potential claims are adequate. WPI is not responsible for the verification of valid driver licenses and insurance.

The owner's auto policy must also respond to any property damage caused by or to the owner's auto. Damage to the owner's auto is covered only if the owner carries "collision" insurance and theft of or glass damage to the individual's auto is covered only if "comprehensive" coverage is purchased. WPI is not responsible or liable for any property damage to the owner's auto, any other auto or any "personal" property.

• **Group Transportation:** When a group needing transportation to and from an activity exceeds five persons, WPI recommends that the group consider rental of a seven or eight passenger van. A WPI faculty or staff member or individual designated by the respective departmental administrator is the preferred driver; however, the van must be driven by a person at least 21 years of age. The driver is encouraged to obtain training specific to the use of the van and to purchase adequate insurance to protect against bodily injury, property damage and collision/theft claims. If a group is traveling outside of a 120 mile radius of WPI, or the trip extends overnight, the group, regardless of size, will be responsible for renting a vehicle.

When a group exceeds twenty persons, the group must charter a bus or other commercial, professionally driven mode of transportation.

**Note:** 12 and 15 passenger vans **may not** be rented, leased or driven by WPI students, faculty or staff.

- **Driving Rules:** Driver(s) information must be included in the event registration form at time of submission. The number of drivers required may vary depending on the distance and duration of the trip. Each driver is allowed to drive a maximum of 4 continuous hours followed by a minimum 2-hour break. Each driver is permitted to drive a maximum of 10 hours over a 24-hour period. One person must be in the front passenger seat and awake at all times to assist with navigation and trip safety such as making sure the driver remains alert. Drivers must obey all state motor vehicle laws and regulations, including posted speed limits.
- **Alcohol:** No alcoholic beverages or beverage containers (open or closed) are allowed in vehicles. Consumption of alcohol by drivers is prohibited at least 8 hours before driving for student organization activities.
- **Travel Times:** Travel is not permitted between 2:00 a.m. and 5:00 a.m. if personal or rented automobiles are being used. Contracted or hired professionally driven transportation may be used for travel during these times.
- **Weather:** In the event of adverse weather or other factors that affect the ability to drive safely, drivers are expected to use good judgment and take appropriate safety measures in observance of travel warnings as issued by the highway safety authorities or weather advisory services.
- Overnight Accommodations: When overnight accommodations are necessary, every effort
  should be made to respect the rights of privacy and adequate space needs of participants by
  ensuring that the number of occupants and genders of those lodged in hotel rooms or other
  accommodations are agreed upon by all occupants.

# ACKNOWLEDGEMENT:

- All participants taking part in a sponsored event off campus must complete a liability release
  form. The advisor and/or student leader for any designated trip is responsible for obtaining
  enough copies of the release form and ensuring that everyone signs this form before departure.
  These forms are to be kept with the trip advisor and kept on record for at least one academic year.
- Additionally, any student, faculty or staff member intending to drive must sign the event
  registration form acknowledging their agreement of this policy, the trip agenda and their
  individual responsibility to adhere to all WPI rules and regulations. This form must be submitted
  to the Student Activities Office in accordance with the timeline outlined in this policy. These

forms are necessary to ensure that all policies are being adhered to and the safety of all involved is considered.

# **NON-COMPLIANCE:**

- Any organization that does not comply with the WPI Student Code of Conduct, Travel Guidelines, or other WPI Policies are subject to disciplinary action as stated in the Campus Planner.
- Reimbursement of travel expenses from a student organization account is contingent on
  compliance with student travel organization policy and procedures. If these policies and
  procedures are not met, no individual, club or organization will be eligible to seek reimbursement
  from WPI for any costs incurred during the trip in question. Failure to comply with any student
  organization travel policies and procedures may result in disciplinary action up to and including
  loss of recognition and/or funding.
- In extenuating circumstances, exceptions to this policy may be made in writing by the Director of the Campus Center and Student Activities Department or his/her designee before the event takes place.

# **Weapons Policy**

The Student Activities Office and all clubs and organizations are held to the policies and laws of the Commonwealth of Massachusetts and Worcester Polytechnic Institute. Weapons of any kind are not permitted to be used within clubs and organization both on and off campus, unless with the clear and written consent of Worcester Polytechnic Institute.

"Conduct that menaces the safety of the WPI community, including but not limited to: fire safety issues; possession of explosive devices or materials; possessions of dangerous weapons (e.g. rifles, shotguns, pellet guns, BB guns, stun guns, other firearms, ammunition etc.) except as permitted by law and then only as authorized in writing by WI, renders one liable for judgment." ~Student Code of Conduction, Section 2 [H].

Should a club or organization wish to use a replica or fake toy that could be contrived as a weapon, approval must be obtained from the Student Activities Office and Campus Police. Contact the Student Activities Office at 508-831-5291 for more information.

# Car Smash Policy

Every effort should be made to ensure the safety of those participating in a Car Smash. The following steps should be taken:

# 1.) Car Prep Remove:

Gas Tank Windows Fluids

> Gas from lines Anti-Freeze Oil (including transmission oil/fluid) Washer Fluid

# Power Steering Fluid Any other potentially messy/explosive matter or part on car

# 2.) Site Prep

Tarpaulin under car (to catch parts)
20 ft. safety radius around car
Speedy-dry on hand to catch any unforeseen spills
Brooms and other clean up tools

# 3.) Protective Wear

# **Smasher:**

Safety Glasses (full surround) Thick Gloves NO Sandals

# **Clean Up Crew:**

Gloves

# 4.) Hammer

# **Sledgehammer**:

Good Quality Handle Plastic is Better Protective guard on handle (even plastic handle)

# **5.) Notify Campus Police**



The Student Activities Office works in unison with the Student Government Association (SGA) in order to provide financial guidance to student clubs and organizations. To that end, the following are the Financial Policies and Procedures for WPI Student Clubs and Organizations.

# Financial Policies and Procedures

## **Raffles and Fundraisers**

All fundraisers should be registered with the Student Activities Office using this online form: wpi.edu/Admin/SAO/Policies/fundform.html

Any event, activity, or program which charges a price for participating and involves a chance to win, or awards prizes, constitutes a raffle. A raffle is considered to be a gambling activity in Massachusetts and therefore falls under the jurisdiction of the Massachusetts State Lottery Commission (MSLC). The WPI Student Activities Office maintains an annual raffle permit which allows student organizations to hold raffles for the benefit of the organization or other charitable causes. Please come to the Student Activities Office and register your fundraising activity.

If your organization would like to sponsor a raffle please go to the following website to review the procedure: wpi.edu/Admin/SAO/Policies/fundraisers.html.

# **Casino Nights**

Casino Nights, involving games of chance (i.e., gambling activities), are also regulated by the Massachusetts State Lottery Commission (MSLC). "Casino Night" events in which no charge is required of the participants (either to enter the event or to participate in the games) do not require a license. Organizations wishing to hold a Casino Night that requires a state license should contact the Student Activities Office at least 30 days prior to the event taking place to obtain the proper permits and forms. Go to the CCSA website for the complete guidelines at: <a href="wpi.edu/Admin/SAO/Policies/casino.html">wpi.edu/Admin/SAO/Policies/casino.html</a>.

## Food Sales

All food sales must be approved by Chartwells. Contact Joe Kraskouskas (<u>dakajoe@wpi.edu</u>) for approval.

# A Special Note for Chartwells Bills

The WPI Dining Service charges accounts automatically upon rendering services. Organizations will receive a confirmation copy of the transfer, outlining services and charges. You do not need to process this transfer. If you feel you have been charged in error, contact the Dining Service at campus extension 5253.

# **Copyrighted Materials used for Fundraising**

Use of copyrighted games or other materials for any fundraising purpose must be approved by the manufacturer prior to its use as dictated by Federal Copyright Law.

# **How to Process Financial Paperwork**

To access forms you need in order to process your organization's financial paperwork go to wpi.edu/Admin/Acc/SAO.

*Once on-line, the treasurer should:* 

- Complete the correct form
- Print it
- Obtain the appropriate signatures
- Submit all corresponding paperwork (See below to find out what forms should accompany each request) to the Student Activities Office on the 3<sup>rd</sup> Floor of the Campus Center.

If you're a new treasurer or you have any questions, please come by the Student Activities Office for assistance. Copies of all financial forms are also located in Appendix D.

In addition, please review the PowerPoint available on-line at <a href="http://sga.wpi.edu/Treasurer/">http://sga.wpi.edu/Treasurer/</a> to learn how to process the financial paperwork for student clubs and organizations, or refer to Appendix B.

Read below to find out how to process each request.

- Check Requests
- Expense Reimbursement Forms
- Interdepartmental Transfers
- Completed Paperwork

# Additional Financial Issues:

- Purchase Orders
- Organization Budget Account Numbers
- Expenditure Classification
- Organization Budget Reports
- File Copies of Your Organization's Bills

# **Check Request**

In order to pay an **invoice** for services provided or items purchased, a check request must be completed. If you are paying an individual for services provided by individuals who are not employees or students at WPI, the check request must include the individual's Social Security or corporation's Tax ID Number and a complete mailing address. These forms are available online at <a href="http://www.wpi.edu/Admin/Acc/SAO">http://www.wpi.edu/Admin/Acc/SAO</a>. The original invoice must be attached with a <a href="paperclip">paperclip</a> to the completed paperwork and submitted to the Student Activities Office.

# **Expense Reimbursement Form**

The expense reimbursement form is used to reimburse individuals for authorized out of pocket expenses associated with an organizations activities. These forms are available online at <a href="http://www.wpi.edu/Admin/Acc/SAO">http://www.wpi.edu/Admin/Acc/SAO</a>. Attach the **original** receipts with a *paperclip* to the expense reimbursement form and submit to the Student Activities Office.

# **Interdepartmental Transfer Forms**

The interdepartmental transfer form (IDT) is used internally at WPI to transfer money between on-campus accounts for services rendered or supplies purchased from other departments or organizations. These forms are available online at <a href="wpi.edu/Admin/Acc/SAO/">wpi.edu/Admin/Acc/SAO/</a> and should be completed by the organization being **owed** the funds.

Complete all appropriate sections of the IDT, and forward the IDT to the organization/department being billed. If your organization is being billed, make sure that the bill is accurate, complete your account number, sign the IDT, and submit the completed form to the Student Activities Office.

# **Cash Receipts Form**

The cash receipts form is used to deposit any funds collected in the form of cash or check from member dues, ticket sales, or fundraising. These forms are available online at <a href="wpi.edu/Admin/Acc/SAO/">wpi.edu/Admin/Acc/SAO/</a>. This form should be completed and a copy of it brought to the Student Activities Office. The original and all checks and cash should be taken to the Accounting Office on the second floor of Boynton Hall. All deposits should be made within 24 hours of receiving the funds. The Treasury Office will issue receipts to departments/groups only for cash deposits. Such deposits should only be hand-carried to the Treasury Office and not sent through campus mail. When making a cash deposit, bring two copies of the Cash Receipts Form to the Treasury Office where a receipt stamp will be placed on your copy of the form.

# What Does One Do with the Completed Paperwork?

Once you have completed a check request or expense reimbursement form, you need to obtain the appropriate signatures, including an officer's signature and a signature from SGA if an SGA funded organization. All completed financial paperwork may be submitted to the Student Activities Office. All Student Activities financial paperwork is processed every Friday.

# **How Long Does It Take To Process Paperwork?**

Checks are run twice weekly and are mailed out on Wednesday and Friday afternoons. Unless specifically requested by you or the vendor, checks are issued 30 days from the invoice date. If unusual circumstances arise and a check is needed immediately, special processing must be requested through the Student Activities staff.

# **Additional Financial Issues**

# **Purchase Order**

A Purchase Order (P.O.) is used to obtaining services or goods prior to paying for them. The P.O. constitutes a contract between the student organization and the vendor; it does not pay for the goods/services, it only guarantees that the student organization will pay when given an invoice. Your organizations treasurer should process the invoice for payment using a check request. Student organizations may obtain a P.O. in the Student Activities Office. Completed forms are then given to a member of the Student Activities staff. The Student Activities Office staff will check the organization's account for adequate funds, and then sign-off on the form for your use. Student Activities will retain a copy of the P.O. for record purposes.

# **Organization Budget Account Numbers**

Each recognized student organization must have a WPI account for their use. These accounts may be used to pay internal charges, such as Facilities, Chartwells, or Lens and Lights charges. Your WPI account may also be used to pay any bills from external vendors. A typical student account looks like this:

FUND: 83500 Organization: 72810

Whenever an account is designated on a Check Request, Expense Reimbursement Form, Purchase Order or other financial documents, the treasurer must sign the document. The signature of the responsible person authorizes the Business Office to charge the account.

\*Paperwork lacking the required signature will be returned to your organization's box in the Student Activities Office\*

# **Student Organizations Expenditure Account Classification**

The account code designates the type of expense you are making. Use the most appropriate account number even if there is no budget associated with that line item. This will help your organization request their budget allocation for the next fiscal year. All organizations should use the account codes listed below.

Account Codes:

Campus Police 71971

Competition Costs 7647

Copying	7152
Equipment	7181
Equipment Rental	7185
Food	7222
Lens & Lights	71973
Other (description required)	7731
Plant Services	71972
Postage	7131
Programming	7646
Fundraised/Rollover	7649
Safety	7651
Supplies	7111
Telephone	7191
Travel	7311

# **Organization Budget Reports**

The organization treasurer may request a printout of the organization budget from the Student Activities Office. This report outlines an organization's expenditures and deposits. Organization treasurers should use the report to check the accuracy of their personal records. Discrepancies should be addressed with the Student Activities Office.

# File Copies of your Organization Bills

A copy of all student organizations' financial paperwork is kept on file in the Student Activities Office. This allows the staff to be aware of the status of all charges accrued to any organizations account. The Student Activities Office encourages organizations to maintain their own files, as well, for future reference.



This section will provide you with the resources you need to successfully plan events on and off campus as well as provide tips for your organization to run effectively.

# Program Planning Resources

# **Sample Programming Timeline**

Ш	Check availability of desired space and equipment
	Establish budget and arrange the funding for the event
	Review and develop an understanding of relevant policies or regulations with your advisor
	Establish a publicity plan
	Negotiate with performer for date, time, place and compensation (do not make any promises)
	Contact the Student Activities Office for procedures in contracting of the performer(s)
* Eight	Weeks Prior to Event:
Ĭ	Arrange for advance ticket sales (if any)
	Begin implementing the publicity plan
	Order (or develop) promotional and other printed material that will be needed
	Order (of develop) promotional and other printed material that will be needed
* C! XX	Vooles Defon to Enout.
	Veeks Prior to Event:
	Revise budget as actual costs become known
	Send any promotional mailings for event
* Four	Weeks Prior to Event:
	Review and change publicity plan as needed
	Revise budget as actual costs become known
	Confirm room and equipment needs of performer with Events Office
	Confirm performer's travel plans and setup needs
	Check to insure that all college paperwork is being processed (room setup, equipment rentals, performer
	compensations, etc)
	Send out press releases and public service announcements (if they are part of the publicity plan)
* Two \	Weeks Prior to Event:
	Check advance ticket sales (if any).
	Check advance ticket sales (if any).
	Check advance ticket sales (if any). Confirm that the publicity plan is on time and within budget
	Check advance ticket sales (if any). Confirm that the publicity plan is on time and within budget Implement any last minute publicity that may be needed
	Check advance ticket sales (if any).  Confirm that the publicity plan is on time and within budget Implement any last minute publicity that may be needed  "Walk through" the event and double check that everything has been arranged and requested
	Check advance ticket sales (if any). Confirm that the publicity plan is on time and within budget Implement any last minute publicity that may be needed
	Check advance ticket sales (if any).  Confirm that the publicity plan is on time and within budget  Implement any last minute publicity that may be needed  "Walk through" the event and double check that everything has been arranged and requested  Confirm staffing needs
* Week	Check advance ticket sales (if any).  Confirm that the publicity plan is on time and within budget Implement any last minute publicity that may be needed  "Walk through" the event and double check that everything has been arranged and requested Confirm staffing needs  of the Event:
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* Week	Check advance ticket sales (if any).  Confirm that the publicity plan is on time and within budget Implement any last minute publicity that may be needed  "Walk through" the event and double check that everything has been arranged and requested Confirm staffing needs  of the Event:
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* Week	Check advance ticket sales (if any). Confirm that the publicity plan is on time and within budget Implement any last minute publicity that may be needed "Walk through" the event and double check that everything has been arranged and requested Confirm staffing needs  of the Event: Publicity plan completed Budget revision completed Last minute publicity completed Final arrangements and double checks on all aspects of the event completed Make arrangements to meet the performer upon arrival  of the Event: Check all arrangements early. If a change is needed you will need time to make or request the change Be available for the unexpected Meet and greet the performer upon arrival  w Up (Within One Week After Event): Thank you letters to all involved groups and individuals
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* Week	Check advance ticket sales (if any). Confirm that the publicity plan is on time and within budget Implement any last minute publicity that may be needed "Walk through" the event and double check that everything has been arranged and requested Confirm staffing needs  of the Event: Publicity plan completed Budget revision completed Last minute publicity completed Final arrangements and double checks on all aspects of the event completed Make arrangements to meet the performer upon arrival  of the Event: Check all arrangements early. If a change is needed you will need time to make or request the change Be available for the unexpected Meet and greet the performer upon arrival  w Up (Within One Week After Event): Thank you letters to all involved groups and individuals

### **Student Programming Sheet**

Name(s) of Program Coordin Name of Student Group: Number:	nator (s):		Email:	
Fund, Org, &Account #:				
Name of Program:		<b>.</b>		m·
Ticket Price:		Date:		Time:
Purpose of Event:				
	Note	Person	Date to Be	Date

	Note	Person	Date to Be	Date
		Responsible	Accomplished	Accomplished
Agency				
First Contact Hold on Date				
Contract				
Reviewed/Signed by SAO				
Contract Sent				
Contract Returned				
Check				
Requested				
Pick-Up				
Hospitality				
Hotel Booked				
Confirmation #				
Meals				
LNL				
Work Order Requested				
Publicity				
Posters				
Flyers				
Mailboxes				
RA Boxes				
The Towers				
Bulletin Boards				
Social Web				
WWPI				
Gimmicks				
Ordered/Confirmation #				
Arrival/Pick-Up				
<b>Events Office</b>				
Book Venue				
A V Requests				
Tables (amount & size)				
Police				
Plant Services				

#### **Fund Your Event**

Many opportunities exist to obtain funding for your event (See Appendix A- C for complete information.)

#### • Student Speakers Fund

This special funding is a programming resource for the WPI community. Generally, it provides awards of up to \$500 for educational programs produced by WPI students, faculty, staff, departments, or organizations. Find more information later in this section.

#### • Stand Out and Program (SOAP)

The Student Activities Office has been allocated money to broaden campus involvement and programming efforts for student organizations with limited or no budgets. SOAP was established to encourage all campus organizations to apply for a mini-grant to compliment campus-wide social and educational programming. Find more information later in this section.

#### • Special Funding Request from SGA

If an Undergraduate Student Government Association-budgeted organization finds that during the course of the fiscal year it has insufficient funds to carry out its planned activities and/or its constitutional obligations, or if it has need to acquire, repair, or replace equipment or materials; then that organization may approach the Undergraduate Student Government Association for supplemental funding. These special funding request forms can be found on the SGA's website, http://sga.wpi.edu, or in the SGA Office on the 3<sup>rd</sup> floor of the Campus Center.

#### Reserve a Venue

#### **Scheduling Facilities**

Recognized WPI student organizations are permitted to use WPI facilities for official meetings
and programs. There is no charge for utilizing WPI facilities; however, the organization is
responsible for costs associated with custodial services, police coverage, and/or dining services,
and for assuring room cleanliness after use.

#### **Reserving Meeting, Conference, and Function Rooms**

• To reserve a meeting room, conference room or function room for any time of the day or night, you should contact the Events Office at extension 5504. The Events Office can advise you as to what rooms are available and help you match a room with your organization's particular needs. The Events Office will assist you with any auxiliary service requests (e.g., dining service, plant service, audio-visual) you may have. Please remember to schedule early, as meeting space is limited.

#### **Reserving Classrooms and Lecture Halls**

- Requests to reserve a classroom or computer lab will not be accepted by telephone or in person, rather all requests must be made by email to Chuck Kornik at <a href="mailto:cjkornik@wpi.edu">cjkornik@wpi.edu</a> or <a href="mailto:mroncone@wpi.edu">mroncone@wpi.edu</a> at least 24 hours in advance, and include the following:
  - Date(s) of reservation
  - o Start-time
  - o End-time
  - o Purpose of the reservation
  - Expected number of attendees
  - o Room preference (if any)

- Sponsoring student organization
- Contact person in charge/e-mail address
- No reservation is considered final until an e-mail confirmation is made by the scheduler. If card access is needed for off-time reservations, confirmation from WPI Police must also be made.
- Requests will be honored on a first-come, first-serve basis.
- If the intended use is cancelled, the space-reservation must also be cancelled by email notification to the scheduler. Failure to cancel a reservation is grounds for denial of future requests.

#### **Reserving Athletic Facilities**

 Athletic Fields and facilities are reserved directly with the Physical Education and Athletics Department at campus extension 6133 or go to their website at wpi.edu/Academics/Depts/PE/Facilities

#### A Guide to Scheduling WPI Facilities

- Events Office For reserving all large on-campus venues and conference spaces call extension 5504, drop by their office on the second floor of the Campus Center, or go to their website at wpi.edu/Admin/Events/planning.html.
- **Project & Registrar's Office** Email Chuck Kornik at <a href="mailto:cjkornik@wpi.edu">cjkornik@wpi.edu</a> for reserving classroom space
- **WPI Dining & Catering Services** Need food at your event? Get world class catering services from Chartwells. Check out their website at <a href="wpi.edu/Admin/Dining/Catering/">wpi.edu/Admin/Dining/Catering/</a> for menu options for your event.
- Lens and Lights Need lighting or sound? Simply fill out a work order online at <a href="lnl.wpi.edu">lnl.wpi.edu</a>.
- Academic Technology Center Need a video projector, T.V., or laptop computer? Borrow one from the ATC. Call extension 5220 or go to their website at wpi.edu/Academics/ATC/Equipment.

#### **Helpful Hints When Scheduling Any WPI Facility**

- Plan ahead. Meetings should be scheduled at least three (3) days in advance; events should be scheduled at least two (2) weeks in advance. This will allow you time to advertise your event or to notify your membership of a meeting. It will also allow the appropriate auxiliary services to be notified of your event.
- Be flexible. Think about what the needs of your organization are versus booking the same room "because we've always used this room." Another facility on campus may better accommodate your organization than the room you have always used.
- Ask about costs when you reserve a room. Almost any reservation will incur some cost, such as a
  custodian to open and close the facility, as well as to provide services during your meeting/event.
  Ask the Events Office for a reasonable estimate of costs in writing when you schedule a room.
- Request a written confirmation of your reservation from the Events Office. This will avoid any confusion, confirm reservations, and provide for event authorization.

#### **Publicize Your Event**

- WPI Electronic & Printed Calendars In order to have your event posted to WPI's online
  calendars, you must enter your event into the Social Web at socialweb.net. These calendars
  include: The SocComm Calendar, the Student Activities Calendar, the WPI Public Events
  Calendar, the myWPI Events Module, *The Towers* What's Happening, and the Campus Center
  Kiosk.
- Worcester Consortium Calendar The Consortium, as well as many of its colleges also use the Social Web as the source of events for their online calendars. To broadcast your event to the

- entire Worcester Consortium, simply add your event to the Social Web and click the option to notify relevant groups.
- WPIC Video Bulletin Board Message Request Want your event posted on the campus TV Network? Go to their website at <a href="wpi.edu/Academics/ATC/Facilities/wpic.html">wpi.edu/Academics/ATC/Facilities/wpic.html</a> and fill-out the appropriate form and the ATC will be happy to post a notice for you.
- **WWPI Radio Campus Announcement** Have your event announced by a WWPI DJ! Simply e-mail them at <a href="mailto:radio@wpi.edu">radio@wpi.edu</a>.
- **Advertise in The Towers** The Towers, WPI's student newspaper offers discounted advertising rates for all student groups. For information about discounted student organization rates, email towers@wpi.edu or go to their website at <a href="http://towers.wpi.edu/">http://towers.wpi.edu/</a>.
- **Chalking** While chalking can be an excellent way of advertising your event, it is important to follow the chalking guidelines established by the University in order to keep our campus grounds looking great. Review the Chalking Policy at <a href="wpi.edu/Admin/SAO/Policies/chalking.html">wpi.edu/Admin/SAO/Policies/chalking.html</a>.
- **Flyers & Posters** Many bulletin boards are available on campus for posting flyers and posters about your event. Be sure to follow WPI's policy regarding bulletin boards.
- Campus Duplicating Services Duplicating Services, located in the basement of Boynton Hall, provides printing and duplicating services. In many cases, they may be able to do the work at a lower cost than most outside companies.

#### The WPI Student Speaker & Special Event Fund

The WPI Student Speaker & Special Event Fund was established in 1992 as a programming resource for the WPI community. This special funding source generally provides awards of up to \$500 for educational programs produced by WPI students, faculty, staff, departments or organizations. While lectures are a primary focus, proposals are also accepted for programs utilizing panel discussions, debates, films and demonstrations. To submit an application go to http://www.wpi.edu/Admin/SAO/Orgs/SSFform.html.

Requests are reviewed based on the following criteria:

#### 1. Topical Content

This funding source was established to encourage programs on contemporary issues. Programs of this nature are given strong consideration. Other topical considerations include:

**Appeal:** The program should have broad appeal to all members of the WPI community. **Uniqueness:** Programs similar in topical content to ones recently presented stand less of a chance of receiving funding.

#### 2. Matching Funding

This funding source may not serve as the sole monetary source for a specific program. It is expected that any program seeking support will secure funding from at least one other source. Programs with multiple sponsors are highly encouraged.

#### 3. Preparedness

Another goal of this special funding source is to encourage more responsible programming. Requests should demonstrate an understanding of effective planning and promoting of the program. We suggest that your application include a detailed timeline of tasks to be completed leading up to the performance.

The Student Speakers Fund Review Committee is comprised of students, staff and faculty. Requests are sent to the committee (via electronic mail) within two days of submission of a completed form. The committee usually renders a decision within ten days of the request being received. In certain situations, the sponsor may be asked to submit more information prior to a decision being rendered. Awards may be

paid either directly to a presenter or into a departmental or organizational account from which the presenter's expenses will be taken.

The Student Activities Office serves as the contact point for all correspondence regarding the Student Speaker & Special Event Fund. PLEASE NOTE: Funding will be transferred to the sponsoring organization only after the evaluation form is completed.

#### Stand Out and Program (SOAP) Substance Free Programming Fund

The Campus Center and Student Activities Department has been allocated money to broaden campus involvement and programming efforts for student organizations with limited or no budgets. We would like to encourage all campus organizations to apply for a mini-grant to compliment campus-wide social and educational programming. To apply, simply go to <a href="http://www.wpi.edu/Admin/SAO/Orgs/soapgrant.html">http://www.wpi.edu/Admin/SAO/Orgs/soapgrant.html</a>.

#### To be eligible for a mini-grant, programs must meet the following requirements:

- 1. Occur on Tuesday, Friday or Saturday nights;
- 2. Be open to the entire campus;
- 3. The application for funding must be submitted at least one week in advance of the event to assure adequate planning and publicity.

Mini-grants generally will not exceed \$250.00 per program, although exceptions may be made if the application warrants additional funds.

#### The following will be considered in awarding mini-grants:

• Preparedness:

Does the organization(s) have the resources to have a successful program?

• Appeal:

Will the program appeal to a wide variety of students?

• Uniqueness:

Is the group trying something new or expanding a current program?

• Timing:

We have limited funds and these funds need to be dispersed throughout the entire academic year.

• Resources:

Are there other resources available for the organization? Can these expenses be justified?

• Co-Sponsorship:

Sponsoring the activity with more than one organization is encouraged (one application for funding per event)

Please note: Funds will not be transferred to the organization until the Student Activities Office is in receipt of the evaluation form. If necessary, special arrangements can be made.

## Campus Center and Student Activities

100 Institute Rd.

Worcester, MA

508-831-5291

sao@wpi.edu

#### **WPI Collaboration Contract**

Before entering into this contract, both or all parties agree that collaboration is a relationship between two or more organizations to achieve the same goal(s). It is a process that includes many people and requires great communication and cooperation. Any organization designee that signs this contract acknowledges the need to work together and to complete any responsibility or task that is discussed within this contract.

This collaboration contract is between the	(organization) and
(organization).  Please list any additional organizations that are part of this collaboration	below:
Event Information Event Title:	
Date of Event:	
Location of Event:	
Time of Event:	
Price of Event:	
Both organizations are responsible for the following and should divide the necessary. Write down the organization responsible for each task or if bor responsible, what their particular responsibilities will include.	
Advertising:	
Programming/Contracting the Event:	
Securing the venue:	
Requesting plant services:	
Requesting Police and Parking:	
Running or Attending the Event:	

(Continued on the next page)

## **WPI Collaboration Contract (continued)** Set Up of the Event: Ordering Food: \_\_\_\_\_ Break Down of the Event: Payment: Additional Responsibilities/Notes/Expectations: In signing the collaboration contract, (organization) and (organization) agrees to follow this contract and assume full responsibility for tasks appointed within this document. Should the guidelines not be met after the signing of this contract, future collaborations will be re-evaluated and this contract will be considered void. Organization: Organization: Organization Designee Signature: Organization Designee Signature: Advisor Signature: Advisor Signature: If there are additional organizations, please provide information and signatures below:

After this document is completely filled out, please make a copy for each organization and bring one copy to the Student Activities Office located on the third floor of the Campus Center to be

held in organization documentation.

For more information or assistance, please contact the Office of Student Activities at 1-508-831-5291 or by e-mail at <a href="mailto:sao@wpi.edu">sao@wpi.edu</a>.

#### **Hints on Motivating People**

Motivation is the key to being both productive and efficient! When trying to motivate others, one needs to recognize the difference between the needs of others and their own personal motivation. By meeting the needs of others, you create an environment where they people can produce the best results possible. Below is a list of tips on how you can motivate others:



- 1. Make members want to do things
- 2. Study members and determine what makes each tick
- 3. Be a good listener
- 4. Criticize or reprove constructively
- 5. Criticize or reprove in private
- 6. Praise in public
- 7. Be considerate
- 8. Delegate responsibility for details to members
- 9. Give credit where credit is due
- 10. Avoid domination or forcefulness
- 11. Show interest and appreciation of others
- 12. Make your wishes known by suggestions or requests
- 13. When you make a request or a suggestion, be sure to tell the reasons for it
- 14. Let the members in on your plans and programs even when they are in the early stages
- 15. Never forget that the leader sets the tone for his/her members
- 16. Play up the positive
- 17. Be consistent
- 18. Show your members that you have confidence in them and you expect them to do their best
- 19. Ask members for their counsel
- 20. Listen courteously to the ideas of others
- 21. When you are wrong or make a mistake, admit it
- 22. If an idea is adopted, tell the originator why
- 23. Be careful of what you say and how you say it
- 24. Give weight to the fact that people carry out best their own ideas
- 25. Do not be upset with little hassles
- 26. Use every opportunity to build up in members a sense of the importance of their work
- 27. Give your members goals, a sense of direction, something to strive for and achieve
- 28. Keep you members informed on matters affecting them
- 29. Give members a chance to take part in decisions, particularly those affecting them
- 30. Let your members know where they stand

#### **Over Easy: Leadership Transition**

Either you are a newly elected officer and you are trying to get a grip on your new position; or you are completing your term of office and you would like to leave gracefully and ensure that the organization continues with strong leadership. Whether new or old, making a successful leadership transition should be a concern.

#### **Benefits**

A planned, thorough leadership transition is important and has several benefits:

- 1. The most obvious is that it provides for a transfer of significant organizational knowledge. Your group will not have to re-invent the wheel each year.
- 2. It helps minimize the confusion that occurs with the "Changing of the Guard." While new officers try to figure out what is going on, precious time can be lost to the organizations. This time lag affects the whole membership, who may not understand what all the confusion is about. It definitely lessens the group's ability to accomplish their tasks or goals.
- 3. The process of transition can give the outgoing leaders a sense of having completed their jobs: a sense of closure. It can help them let go which is often a difficult thing for committed leaders to do.
- 4. Leadership transition ensures that the valuable contributions of the experienced leaders will be utilized. They are often the most neglected members in your group.
- 5. Finally, the shared information results in the new leadership having more knowledge, and consequently, greater confidence in their abilities.

#### When Do You Start? Early!!

The best transition begins much sooner than in the spring when new officers are selected. The following ideas will aid the transition process.

- 1. Begin early in the year to identify emerging leaders in your organization.
- 2. Encourage these potential leaders through personal contact, helping develop skill, delegating responsibilities to them, sharing with them the benefit of leadership, clarifying job responsibilities, and modeling an effective leadership style.
- 3. When new officers have been elected, orient them together as a group with all the outgoing officers. This allows the new officers an opportunity to understand each other's roles and to start building their team. In some cases, individual officers may also need to meet with their predecessor for more detailed information.

#### **Items to Transfer**

Outgoing officers, think to your own first weeks; what did you wish someone had told you?

- Effective leadership qualities and skills
- Share problems and helpful ideas, procedures, and recommendations
- Write and share reports containing traditions, recommendations, completed projects, continuing projects and concerns, and ideas never carried out
- Go through the personal and organizational files together
- Acquaint new officers with the physical environment, supplies and equipment
- Introduce related personnel (advisors, contracts, etc.)
- Constitution and by-laws
- Job descriptions and role clarifications
- Organizational goals and objectives (including those from previous years)
- Status reports on ongoing projects
- Evaluations of previous projects and programs
- Previous minutes and reports
- Resources and contact lists
- Financial books and records
- Mailing lists
- Historical records, scrapbooks, equipment

#### **Outgoing Officers**

If you are completing your term of office, don't run out on the new leaders! Sharing your experience and knowledge will help them make a successful transition into office.

#### **Transition Notebook**

A transition notebook is one way to help a new officer in their position. It is meant to help guide them and help them learn about all the responsibilities associated with their new office. Use a notebook or binder to hold information such as leadership contact information, advisor information, historical documents, officer position information, goals, timelines, etc. to pass along to incoming officers. This resource could aid them in answering questions or solving problems once outgoing officers have left the organization.

#### **New Officers**

If you are a new officer, take the initiative to learn more about your position. Be assertive and request some training from the outgoing officers. Do not wait until fall term when these experienced people are no longer around.

#### **Effective Publicity**

Publicity is an intrinsic part of any organization. Without the proper publicity, the organization's goals – to raise money, to attract new members, or to provide a program or service – will not be met.

#### **Planning** = **Results**

Before you begin your publicity campaign you should carefully consider the following:

#### **Budget**

How much can you spend? What are the costs involved? Always prepare a budget in advance.

#### Audience

• Who you do you want to reach and what is the best way to reach them? Publicizing to non-students may be an entirely different task than publicizing to students.

#### Information

• Make sure you have all of the needed information (who, what, where, when, cost, etc.) before you prepare your publicity materials.

#### Resources

• Identify your resources – people, talent, material, etc.

#### Location

Where will your materials get the most attention? Choose high traffic areas and give thought to
placing your advertisements in different/unusual places. Be sure to read any policies regarding
posting regulations on campus.

#### **Schedule**

How much time do you have? Are there deadlines that must be met? The optimum time to begin
advertising is 2 -3 weeks before the activity. Write up a calendar with deadlines to help you keep
on track.

#### **Choose Your Weapon! Word of Mouth**

• Probably the best publicity of all is word of mouth. If everyone talks up an event in classes, at parties, in the cafeteria and among their friends, people will get interested.

#### Newspaper

- Most newspapers have an "events column" and will advertise your activity for free. For information about procedures and deadlines contact the newspaper you are interested in.
- It may also be possible to get a press release for your event. A press release is rarely more than one page in length and is a proposed news article written by you, the source. For more information contact the newspaper's editor.
- Another method of publicity would be placing a paid advertisement in the newspaper. While these advertisements can be very beneficial, they tend to be quite expensive.

#### Radio

• FCC regulations require that radio stations make public service announcements (PSA) about programs and events in the community. A PSA cannot sell anything or promote a profit-making enterprise. Contact the radio station of your choice for more information regarding guidelines and deadlines.

• As with newspapers, paid advertising is always an option, but is usually too expensive for a typical student organization.

#### **Specific Resources for WPI**

- Socialweb.net
- Banners on the Bridge
- A-Frame signs and sandwich boards
- Showcase displays in campus buildings
- Bulletin board posting
- Residence hall newsletters
- Some colleges and departments publish newsletters. This can be very effective!
- The Towers
- Campus Radio station: WWPI

#### **Unconventional Publicity Ideas**

- Buttons
- Skits
- Logos
- Curiosity Teasers sneak previews, clues to an event
- Bumper stickers
- T-shirts worn in advance of the event
- Balloons
- Sandwich Boards
- Table tents
- Door knob signs
- Banners on cars and painted cars

- Paper hats
- Utilizing "TP Talk" from Residential Services.
- Leaflets passed out on busy bridges
- Dancing men and women
- Door to door
- Phone-a-thon
- Classroom blackboards
- Pass out free tickets
- Announcements and invitations to relevant people and groups
- Popcorn and candy with flyers

#### **The Bottom Line**

• Planning, creativity and enthusiasm are the necessary ingredients to any publicity campaign. Without effective publicity, even the best ideas will fail.

Information reformatted from the Student Life Department at Michigan State University from the Student Organization Resource Center ("The Source").

#### **Running an Effective Meeting**

Meetings have several functions. They give members a chance to discuss goals and objectives and keep everyone updated on current events. They provide a chance to communicate and keep the group cohesive. Most of all, meetings allow groups to pull resources together for decision making. Start with careful planning, finish with a thorough follow-up, and the meeting will almost run itself. Here are some tips to make your next meeting successful and productive.

#### **Before**

- 1. Define the purpose of the meeting. If you can't come up with a purpose, don't have a meeting.
- 2. Have an executive board/officers' meeting a few days before the general meeting. Develop the meeting agenda at this time. An example agenda might be:

- Call to order
- Approval of Agenda
- Correction and approval of minutes
- Officer reports
- Committee reports
- Unfinished business
- New business
- Announcements
- Adjournment
- 3. Distribute the agenda and circulate background material, such as lengthy documents or articles, prior to the meeting so members will be prepared and feel involved.
- 4. Choose an appropriate meeting time. Set a time limit and stick to it. Remember that members have other commitments.
- 5. If possible, arrange members so they face each other. For larger groups, try u-shaped rows. A leader has better control when he/she is centrally located.
- 6. Choose a location suitable to the group size. Small rooms with too many people get stuffy and create tension. A larger room is more comfortable and encourages individual expression.
- 7. Use visual aids as appropriate, such as posters and charts.
- 8. Vary meeting places if possible, to accommodate different members.

#### During

- 1. Greet members and make them feel welcome.
- 2. If possible, serve light refreshments; they are good ice breakers.
- 3. Start on time. End on time.
- 4. Review the agenda and set priorities for the meeting.
- 5. Stick to the agenda.
- 6. Encourage group discussion to get all view points and ideas. You will have better quality decisions, as well as highly motivated members.
- 7. Encourage feedback. Ideas, activities and commitment to the organization improve when members see their impact in the decision making process.
- 8. Keep conversation on topic. Feel free to ask for only constructive comments.
- 9. Delegate responsibilities and establish due dates. Give members a voice in decision making.
- 10. Keep minutes of the meeting for future reference in case a question or problem arises.
- 11. The leader should act as a role model by listening, showing interest, appreciation and confidence in members. Admit mistakes.
- 12. Summarize agreements reached and end the meeting on a unifying or positive note.
- 13. Set a date and time for the next meeting.

#### **After**

- 1. Prepare and distribute minutes within 24 hours. Quick action reinforces the importance of meeting and reduces error of memory.
- 2. Discuss problems during the meeting with officers, so improvements can be made.
- 3. Follow-up on delegation decisions. See that all members understand and carry-out their responsibility.
- 4. Give recognition and appreciation to excellent and timely progress.
- 5. Put unfinished business on the agenda for the next meeting.
- 6. Conduct a periodic evaluation of the meetings. Weak areas can be analyzed and improved for more productive meetings.

#### **Delegation**

#### **DELEGATION** is important because it:

- 1. Allows more people to be actively involved
- 2. Distributes work load
- 3. Motivates members by giving them value and importance

#### WHAT and WHEN to delegate:

- 1. When there is a lot of work
- 2. Minor decisions
- 3. Details that take up large chunks of time
- 4. When you feel someone else has particular qualifications which would suit the task
- 5. When someone expresses interest in the task
- 6. When you think a particular person may benefit from the responsibility

#### WHAT and WHEN NOT to delegate:

- 1. Things that are usually your specific responsibility
- 2. A task to someone who may not possess the necessary skills or capacities
- 3. The "hot potato"
- 4. Something that involves confidentially
- 5. Something you yourself would not be willing to do (the menial work)

#### **METHODS** for delegating:

- 1. Ask for volunteers interest and belief in something is one of the greatest motivators for success
- Suggest someone you feel would be good for the task. Silence in response to a request for
  volunteers does not necessarily mean lack of interest. Often, a person won't volunteer because
  they lack self-confidence
- 3. Assign the task to someone. The person can always decline
- 4. Spread the good tasks around "good" jobs give people status and value. Make sure the same people don't always get the good tasks
- 5. Explain the task and give any specific instructions. Do not set someone up to fail because they did not have the necessary information to accomplish the task
- 6. Set up definite expectations for work performance
- 7. Communicate/follow-up regularly to see that the task is getting done
- 8. Give feedback This can be an opportunity for giving recognition and encouraging growth

#### **Recruiting New Members**

**Old members of student organizations don't die; they graduate!** New members are vital to any organization. They provide new ideas, enthusiasm and replacement for lost members.

#### **STEP I – Examine Your Organization**

You must know the product before you can sell it. Knowing the answers to the following questions will help your group define who and how to recruit.

- 1. What is the group's purpose?
- 2. What are the group's future plans?
- 3. How many people do we realistically want and/or need to constructively function as an organization?

#### **STEP II – Determine a Recruit Profile**

Who do you want to attract to your group? Answer the following questions to help your group find and identify potential new members.

- 1. What academic level is desirable or doesn't it matter?
- 2. How will diversity amongst your members (sex, race, creed, ethnic group, etc.) enhance your organization?
- 3. Is academic major important?
- 4. Are there any particular skills or talents you are looking for in members?
- 5. Are you looking for people with a particular interest or hobby?

#### STEP III – Advertise

Now that you have examined your organization and determined who potential members might be, you need to get the word out. Answering the following questions will help you develop your publicity.

- 1. What medium will most likely appeal to your potential new member?
- 2. Is there a certain spot on campus this person is likely to be?
- 3. What resources (people, time, money) does the organization have to give to a publicity campaign?
- 4. What does your organization have to offer to prospective members? Incorporate these things in your publicity materials.

#### **STEP IV – Retaining Your Members**

Your new members, like your old members, need to feel like they belong in the group. Get them involved in the activities of the organization. Get to know them and help them to get to know you. Do not treat them as intruders invading your territory. Let them know their contributions are needed and appreciated.

#### **Committees**

A committee is a group of people elected or appointed to perform a certain function. Committees are often the backbone of an organization. They proved careful study and analysis that allow the parent group to make the best, final decisions.

#### SUCCESSFUL COMMITTEES

Successful committees have:

#### 1. A Purpose

Unproductive committees often lack a meaningful purpose. Committees should have clearly stated, reasonable goals.

#### 2. A Good Leader

Each committee should have a chairperson. The chairperson should run the committee meetings, guide discussion, and facilitate delegation of tasks.

#### 3. Good Members

Committee members should be carefully selected, diverse and compatible. They should also have interest, knowledge, and if necessary, skill in the committee's task.

#### 4. Size

Optimal committee size is around 5-7 people. Too few people is not enough for ideas and tasks; too many people can cause confusion and people lose interest if not actively involved.

#### TYPES OF COMMITTEES

Some organizations suffer from "committee-itis", too many committees. Make certain that the job really requires a committee. Ask yourself, "Will it interfere with the normal functioning of our group if no committee is formed?" There are typically two types of committees:

#### 1. Permanent

These committees are formed to handle the ongoing, regular, major aspects of an organization (i.e., social committee, budget committee, etc.)

#### 2. Ad-hoc

These committees are short term or for one-time only projects (i.e., constitution review committee, office redecoration committee, etc.)

Committees can be an integral part of every organization. A committee with a good purpose, a good leader, and good members will be a success; success for its members and the parent organization.

#### **Making Programs More Affordable**

The expense of putting on a major program, activity or event can be huge. It is unfortunate that many great programs do not take place because it is cost prohibitive. There are a few things groups can do to make programs more easily affordable.

#### **Co-Sponsorship**

Would your group consider sponsoring an activity with another organization? Talk with other student groups, in addition to academic and administrative units, that may have an interest in your particular program. Many organizations would love to be involved, but lack the people and financial resources to put on a program themselves. However, your group must be willing to share the limelight and perhaps give up total control of the planning and implementation. If another organization agrees to be a cosponsor they will be more than likely have some input regarding how the program will look. Be specific in your co-sponsorship agreement what the obligations and responsibilities of each party will be.

#### **Ask for Monetary Contributions**

This is different from asking another organization to be a co-sponsor. You are not willing to share sponsorship, but are looking only for financial support. Often other student groups, University administrative units, and academic departments are willing to make a monetary donation to your group's efforts. Typically, those receptive to making a donation to your program are groups and individuals who have a strong interest or belief in the program or subject matter. Instead of wandering aimlessly looking for donations, brainstorm individuals, groups, and units who may have an interest in your program, then solicit contributions from these groups. This will save time and increase your chances of having success.

#### Negotiate

Often speaker, artist, and performer fees are negotiable. On occasion, service, equipment, and other program needs are also negotiable. Do not assume that just because the performer states their fee is \$1,200 that you must automatically pay it. Make an offer for the amount you can afford or think is reasonable. Negotiate. It never hurts to ask.

#### **Block Scheduling**

When bringing a major speaker or performer to campus you can often make the program more affordable by block scheduling the performer with nearby colleges and universities. Contact other schools to see if they are interested in the program. Contact either the campus activities office or find out if there is a club or organization similar to yours on the campus. Through block scheduling often performer travel expenses can be shared and performers are more willing to negotiate with their performer fee because they have more than one engagement. Having more than one engagement allows the performer to make more money, while only needing to take one trip.

#### **Donations of Good and Services**

Many times groups, University departments, and even commercial businesses are unable to give a monetary donation to your program, but are willing to donate materials and services. Common donations are free copying of flyers and posters or use of equipment and meals for the performer. Contributions of this nature can greatly reduce program costs and should not be overlooked.

#### **Free Publicity**

Publicity can be a huge expense. Utilize all forms of advertising that are free and be creative in your publicity strategy. Most TV and radio stations have a forum for announcing community activities. Likewise, local newspapers can be helpful. Often newspapers will even write an article about the event if it is deemed newsworthy. Ask professors to make announcements in their classes about your program.

They are especially receptive to these requests when the program is somewhat related to the course subject or discipline. With a little attention and creativity your group can significantly reduce publicity expenses.

#### **SGA**

Your student government allocates student fees back to student organizations for projects, programs, equipment, and other various needs. Groups are required to complete a Special Funding Request and then group representatives meet with the SGA Financial Board regarding the project. To apply for funds, student organizations can pick up an application in SGA Office on the third floor of the Campus Center (CC 313).

#### Other

There are the more traditional ways of subsidizing programs also. You may want to consider an admission fee, selling concessions, or holding separate fundraisers in order to help pay for the program. You may need a combination of the above alternatives in order to afford the activity. With determination, assertiveness, and creativity you can afford just about anything.

Information reformatted from the Student Life Department at Michigan State University from the Student Organization Resource Center ("The Source").

#### **Guide to an Effective Student Organization**

#### **Organizational Roles**

No organization can effectively run without every member of the organization understanding the roles and responsibilities of each of the members. Every organization is different, however, here is a basic format of common roles of a student organization:

#### **President/Chairperson:**

The role of the President or Chairperson is one of the most important roles in your organization. The person who has this position should be a good administrator, leader, and be creative as well as assertive. This person must be very focused on what the organization needs and how it can accomplish its needs. The President or Chairperson must make the organization a well functioning team by involving every member in organization matters. This person must be objective when needed to create an effective team.

#### **Vice President/Vice Chairperson:**

This position is just as important as the President/Chairperson of the organization. The person who has this position would take over the responsibilities of the President/Chairperson in their absence. Many organizations do not utilize this person to their fullest potential. Make sure you assign specific tasks to the Vice President/Vice Chair in order for them to get a chance to be actively involved in the organization.

#### **Treasurer:**

The person in this position should be keeping an organized budget report for the organization. It is this person's responsibility to understand all budget procedures and pay all bills promptly. This person should keep a good record of your organization budget so that he/she can tell the organization if a program or purchase is feasible.

#### **Secretary:**

The role of this person is to keep accurate notes of each meeting and distribute them to every member following the meeting. The secretary should keep a list of all members contact information as well as people who may show interest in joining the organization. The secretary is a key player in keeping communication among all members of the organization this will keep members from leaving your group.

#### **Members:**

The members are your organization!! Your members should be active in your organization they should have specific responsibilities to keep them excited about the group and what it is doing. Officers are important but they should not do all the work. Members should take part in decision-making, event planning, fundraising, budget tracking, publicity etc. Your members are your backbone. Keep them involved and energized and your organization will succeed.

#### Advisors:

Each organization should have an advisor. This person will assist the organization in many different ways. Some advisors have been affiliated with the group for many years and can bring history and knowledge that no other member can bring to the organization. Others have experience working with the organization in different capacities. The advisor should not be just a signature, but a resource to your organization.

#### **Goal Setting**

Goals will provide your organization with direction, they will describe what your organization hopes to accomplish throughout the year.

When sitting down trying to come up with your goals, you should ask yourselves a few questions:

- What does your organization need to do to fulfill its basic purpose?
- What problems do we need to solve?
- What can we do to make our organization even better?

After you have answered all of these questions, ask the following questions about your goals:

- Is it achievable? Do we have enough time, skill, strength and resources to accomplish our goals?
- Are these goals realistic and believable for us? Do we as a group believe we can achieve these things?
- Is it specific and measurable? Is it concrete, specific and understandable? Do we know what we need to do to achieve these goals?
- Do we have a target date in mind to achieve these goals?
- Does everyone want to achieve the same goals?
- Do our goals fit with the purpose of our organization?
- Do we think we will make a difference?

Make goals that your group can accomplish. After writing out your goals make sure you ask yourself the questions above to help elevate any goals you may not be able to achieve.

#### **Parliamentary Procedure**

Parliamentary Procedure is a group of rules that help an organization run a meeting. Organizations usually follow the agenda listed below:

- 1. Call to Order
- 2. Roll Call
- 3. Reading and approval of the minutes
- 4. Reports from officers and standing committees
- 5. Special Orders
- 6. Unfinished business
- 7. New Business
- 8. Announcements
- 9. Adjournment

Individuals may propose that the organization take certain actions by "making a motion." You can make a motion by doing the following:

- Obtain the floor
- Make your motion
- Wait for a second
- Chair states your motion
- Expand your motion
- Call for a vote

•

#### **Group Decision Making**

Organizations make decisions every day, the following is a list of the different types of decisions made:

Unilateral – a decision made by one person without consultation with other group members.

<u>Handclasp</u> – a decision made by two members. One member makes a decision and the other supports it without adequate discussion by the group.

Baiting – a technique that reduces discussion about group decisions ( "now we all agreed....right?")

Majority Rule – a larger group makes a decision. It is usually 2/3 of the group.

Consensus – after much discussion everyone agrees on a decision.

An effective group can produce more than an individual acting alone. If everyone in your organization takes part in group decision making, they will give back more to the group and enjoy working with the team.

\*\* Adapted from the Carnegie Melon Student Organization Handbook

#### **Creating a Team**

To create a team that works, here are seven skills that can help you:

- **Listening** Listening to everyone's ideas will help gain new and improved ways of doing things
- **Questioning-** If students in a team question each other, positive communication will take place and interaction among members will be better
- Persuading You will defend and rethink ideas and exchange thoughts about what is going on

- **Respecting** If you respect each other's ideas, more work will get done. Encouragement and support will take place and people will want to stay involved or join your organization
- **Helping** Each member will be more willing to ask questions and assist each other with daily tasks
- **Sharing** Members will be more willing to do the above if they share ideas in the learning process
- Participate Everyone will contribute to each other's ideas as well as to the rest of the group



Appendix A:
The SGA Budget Process

#### Title 7. Fiscal Structure and Policy

#### Article I. Classification of Student Organizations

#### **Section 1.** The Classification Structure and Purpose

- A. There shall exist six (6) organizational classes into which each recognized undergraduate student organization, with the exception of the Undergraduate Student Government Association, shall be classified.
- B. Each Recognized student organization shall be classified by the Committee on Appropriations with approval of the Senate.
- C. All organizations recognized by the Worcester Polytechnic Institute shall be considered Undergraduate Student Government Association member organization, eligible to apply for Undergraduate Student Government Association funding one (1) year after the date of official recognition.
- D. The Undergraduate Student Government Association shall not be classified into any of the six (6) organizational classes, as it is responsible for creating and maintaining this fiscal structure.
- E. In order to receive funding from the Undergraduate Student Government Association, an organization must have fulfilled the requirements of the Student Organization Council (SOC) and Student Activities Office (SAO).
- F. The requirements for the SOC recognition shall be determined by the SOC.
- G. The requirements for SAO recognition shall be determined by the SAO.
- H. Upon completion of these requirements and those concerning budgetary processes outlined in Article III, Section 2 of this title, the Senate shall oversee all issues concerning funding.

#### Section 2. The Classes

#### A. Class I.

- 1. Those organizations open to all Worcester Polytechnic Institute undergraduate students which focus on a specific area of interest and do not receive a yearly operation budget form an international, national, regional, state or local organization shall be members of Class I.
- 2. Hobby-related, ethnic, religious, political, social and academic/professional organizations shall be considered to focus on specific areas of interest.
- 3. Class I organizations shall be entitled to apply for a yearly budget and special funding as outlined within the Undergraduate Student Government Association Bylaws.
- 4. All budgets awarded to Class I organizations will be allocated out of the funds collected through the undergraduate Social Fee. These moneys allocated shall not go toward paying personal dues to international, national, regional, state or local organizations.

#### B. Class II.

- 1. Those organizations open to all Worcester Polytechnic Institute undergraduate students and classified as club sports by the university shall be members of Class II.
- 2. Class II organizations which are not funded by the Athletic Department shall be entitled to apply for a yearly budget and special funding as outlined within the Undergraduate Student Government Association Bylaws.
- 3. All budgets awarded to Class II organizations will be allocated out of the funds collected through the undergraduate Social Fee.

#### C. Class III.

- 1. Those organizations unaffiliated with international, national, regional, state, or local organizations are open to all Worcester Polytechnic Institute undergraduate students and whose primary purpose is to provide programming, publications, and /or services open and available to the entire undergraduate student body shall be members of Class III.
- 2. Programming for the entire undergraduate student body shall be defined as programs which educate, entertain, and/or expose students to the arts.
- 3. Class III organizations shall be entitled to apply for a yearly budget and special funding

as outlined with the Undergraduate Student Government Association Bylaws.

4. All budgets awarded to Class III organizations will be allocated out of the funds collected through the undergraduate Social Fee.

#### D. Class IV

- 1. Those organizations open only to certain segments of the Worcester Polytechnic Institute student body shall be members of Class IV. These organizations shall include, but are not limited to honor societies, Greek organizations not falling under the classification of a class V organization below, and exclusive professional societies.
- 2. Class IV organizations shall be entitled to approach the Senate for funding for specific programming needs provided no other funding source exists and the activity or program is open to the entire undergraduate student body.

#### E. Class V.

- 1. All fraternities and sororities shall be members of Class V. A fraternity or sorority is defined as a nationally affiliated organization with an incorporated housing corporation.
- 2. Any student organization wanting to be Class V must be externally incorporated and have federal tax identification number.
- 3. Only Class V organizations are allowed to hold bank accounts outside of the University's Accounting Office.
- 4. Class V organizations will be eligible to apply for special funding as outlined by the Undergraduate Student Government Association Bylaws.,

#### F. Class VI.

- 1. All organizations recognized by the SOC who have not yet applied for reclassification shall be classified as a Class VI organization.
- 2. Organizations in this class may apply for reclassification between twelve (12) and eighteen (18) months form the date of recognition by the SOC.
- 3. If after eighteen (18) months there has been no application for reclassification of the organization submitted to the Senate, then the organization will become once again unrecognized. The Treasurer will make it known to the Senate at the next available meeting.

## Article II. Organizational Class Finance Committees (OCFCs) Section 1. Membership

- A. There shall exist three (3) Organizational Class Finance Committees, herein referred to as Organizational Class Finance Committees, one designated for Class I, one for Class II and one for Classes III, Class I and II Organizational Class Finance Committees shall be presided over by the designated Class Treasurer, as defined in Article III of Title 5, and shall consist of either (8) undergraduate representatives form organizations within the corresponding class. The Class III, defined in Article II of Title 5 and shall consist of a number of undergraduate representatives determined yearly by the Committee on Appropriations.
- B. Election of Organizational Class Finance Committee Representatives.
  - 1. Nominations for Organization Class Finance Committee representatives will occur no later than the fourth (4th) week of B-term
  - 2. Each organization within a particular class may nominate one (1) member of that organization as an Organizational Class Finance Committee representative for that class.
  - 3. Neither the Undergraduate Student Government Association Treasurer nor any of the four (4) Class Treasurers may serve as Organizational Class Finance Committee representative.
  - 4. The names of nominees will be collected and a lottery conducted by the SGA Treasurer to determine the Organizational Class Finance Committee representatives in each class no later than the fifth (5th) week of B-term.
    - 5. In the event that less than eight (8) names are submitted for Class I and Class II Organizational Class Finance Committees, each organization will be asked to submit a

- second (2nd) name and a second (2nd) lottery will be conducted to bring the number of representatives to eight (8).
- C. An Organizational Class Finance Committee representative who fails to attend any meetings of the committee will have five percent (5%) subtracted from every line item of their budget request immediately, unless it is determined by the SGA Treasurer that an extenuated circumstance was present. This penalty shall, in no way, affect the budgeting process and any potential subsequent budget cuts.

#### Section 2. Duties of Organizational Class Finance Committee Representatives

- A. Attend all meetings and training sessions of the appropriate Organizational Class Finance Commit tee.
- B. Serve as a voting member of the appropriate Organizational Class Finance Committee
- C. Be familiar with the Fiscal Structure and Policy outlined herein.

#### Section 3. Duties of the Organizational Class Finance Committee

- A. Review budget proposals from organizations within the appropriate class.
- B. Recommend to the Committee on Appropriations a budget for each organization within the class.

#### Article III. Budgetary Policy

#### Section 1. Fiscal Year

A. The Fiscal year for the Undergraduate Student Government Association and all member organizations will be from July 1 through June 30 of the subsequent year.

#### Section 2. Budgets

- A. Budget packets will be distributed to student organizations during the second (2nd) week of B-term
- B. Completed budget packets are to be returned to the Undergraduate Student Government Association Office on or before the final day of B-term. Budget requests submitted after this time will not be considered under any circumstances.
- C. Organizations requesting budgets shall provide the following along with the completed packet:
  - 1. A fiscal proposal for the upcoming academic year,
  - 2. A detailed explanation of funds requested for each budget line,
  - 3. A current list of active undergraduate members, where active membership is defined in the packet.
- D. Officers of student organizations should check with the Club Sports Office (Class II) or the Student Activities Office (Classes I & III) to ensure that a list of capital equipment owned by the group (any items worth more than one hundred dollars (\$100.00) and a current copy of the organization's constitution are on file in one (1) of those offices.
- E. The Student Activities Office must have all documents readily on file in accordance with Article I, Section 1 of this title.
- F. Budget hearings with each organization shall take place with the respective Organizational Class Finance Committee during C-term. Organizations will be officially notified of budget hearings at least one (1) week in advance.
- G. Each Organizational Class Finance Committee shall submit its budget recommendations to the Committee on Appropriations by the fifth (5th) week of C-term.
- H. The Committee on Appropriations shall present the total recommended budget for each class to the Senate for approval no later than the second (2nd) meeting of D-term.

#### Section 3. Budget Hearing and Review

- A. The Organizational Class Finance Committee will meet with each organization for the purpose of reviewing the requested budget.
- B. The Organizational Class Finance Committee will decide how each item in the organizations budget fits into the budget priorities established by the Committee on Appropriations.
- C. The Organizational Class Finance Committee shall review the organizational actual expenses for the last fiscal year and insure that the proposed budget is in line with previous spending.
- D. Upon the completion of all budget hearings, the Organizational Class Finance Committee will

- propose to the Committee on Appropriations a total class budget which is within the financial constrains established by the Committee on Appropriations.
- E. Budgetary Status. All organizations of Worcester Polytechnic Institute shall be classified as either Budgeted or Non-Budgeted.
  - 1. <u>Budgeted Organization</u>—An organization having been SOC recognized, SAO approved and having gone through the budgeting process in accordance with this Title shall be known as having Budgeted Status and is eligible for additional funding if necessary.
  - 2. Non Budgeted Organization—An organization which receives no annual funding due to not being recognized by SOC, not being approved by SAO or simply receiving a budget of \$0.00 at the budgeting process shall be known has having Non-Budgeted Status. An SOC/SAO recognized organization receiving no annual budget is still eligible for Special Funding pursuant to Article IV Section 6 of this Title.

#### Article IV. Fiscal Policy

#### Section 1. Appropriate Use of Undergraduate Student Government Association Funds

- A. Funds should be spent out of the most appropriate budget line even if that particular line did not receive a budget.
- B. Undergraduate Student Government Association funds may not be used to purchase alcohol or any illegal substances.
- C. Any unused funds budgeted to student organizations through the Undergraduate Student Government Association will be returned to the Undergraduate Student Government Association Treasury at the end of the fiscal year.
- D. All undergraduate organizations recognized by SOC and the Senate must maintain all financial accounts within the Worcester Polytechnic Institute accounting system.
- E. No Undergraduate Student Government Association budgeted organization may have a negative balance in their account at the end of the fiscal year.

#### Section 2. Expenditures

- A. If there is a request for reimbursement for personal expenditures related to an organization in excess of fifty dollars (\$50.00), a reimbursement form must be signed and approved by the SGA Treasurer before being processed.
- B. Transportation expenses will be reimbursed on a per mile basis from organizational funds and at the rate established by the University.
- C. For any convention or conference, Undergraduate Student Government Association Funds may only be used to pay for official transportation costs, registration fees and accommodations.

#### Section 3. Fund-raising

- A. Organizations in Classes I, II, IV, and VI shall abide by the fund-raising policies outline din this section.
- B. Organizations are encouraged to hold fund-raisers whenever possible.
- C. Organizations wishing to hold a raffle or casino night must first obtain permission and necessary forms form the Student Activities Office.
- D. After the completion of each fund-raiser, organizations must submit a final report to the Committee on Appropriations no later than two (2) weeks following the end of the fund raiser.

#### Section 4. Deposits

- A. All of an organization's fund-raised moneys must be deposited in the fund-raising budget line of the organization's Worcester Polytechnic Institute account within three days of the activity. Fund-raised moneys are those moneys collected by an organization after a fundraising event that are over and above the costs incurred in producing the event.
- B. Organizations which wish to keep a petty cash box may do so only with prior approval of the Student Activities Office. Petty cash accounts will be established by filling out a check request for petty cash and will not exceed one hundred dollars (\$100.00). All receipts form petty cash purchases shall be kept in the box and be turned in with a check request to replenish the petty

cash. This policy shall be in line with the Worcester Polytechnic Institute policy on petty cash. C. All funds raised by an organization belong to that organization unless an identifiable debt is owed or if the policies of Article IV, Section III were not followed.

#### **Section 5. Student Government Reserve (SGR)**

There shall exist a reserve designated as the Student Government Reserve. Moneys deposited in the SGR shall be any surplus of funds from the moneys used to budget Student Government member organizations and any unused funds which have been reclaimed at the end of each fiscal year. The moneys in the SGR shall be available for allocation by the Senate at the direction of the Committee on Appropriations. All funds awarded in accordance with Section 6 of this article shall be drawn from the SGR. Any allocation out of the SGR which exceeds five thousand dollars (\$5,000.00) shall require a two-thirds (2/3) vote of the Senate for passage.

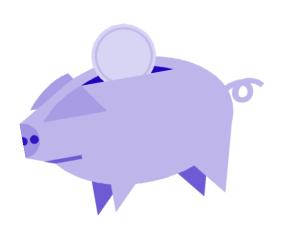
#### Section 6. Special Funding

- A. Types of Special Funding
  - 1. Supplemental Funding—If an Undergraduate Student Government Association budgeted organization finds that during the course of the fiscal year it has insufficient funds to carry out its planned activities and/or its constitutional obligations, or it has need to acquire, repair or replace equipment or materials, then that organization may approach the Undergraduate Student Government Association for supplemental funding. Supplemental funding will be limited to five thousand dollars (\$5,000.00).
  - 2. Emergency Funding—If an Undergraduate Student Government Association budgeted organization is faced with a situation in which it can no longer operate due to lack of funds, that organization may approach the Undergraduate Student Government Association for emergency funding. Emergency funding is an allocation of funds to an organization to allow it to resume proper operation. Emergency funding shall be limited to only those funds that permit an organization to operate at a base level.
  - 3. Program Funding—Any recognized organization planning an event or program open to the entire Worcester Polytechnic Institute undergraduate student body may approach the Undergraduate Student Government Association for program funding in an amount exceeding that available from any other funding source. Requests may be made to cover contract costs, publicity costs, custodial or support services (sound and lights, campus police, etc.) costs.
  - 4. Capital Funding– If an Undergraduate Student Government Association budgeted organization has the need to purchase articles with a value that exceeds and organization's ability to purchase within the budget of one fiscal year and/or the level set on supplemental funding, that organization may approach the Undergraduate Student Government Association for capital funding. Capital funding requests will be accepted in accordance with the timeline established by the Committee of Appropriations

#### B. Procedures for Special Funding

- Organizations requesting Special Funding must fill out and submit to the Undergraduate Student Government Association Chair of the committee on Appropriations a "Special Funding Requisition Form". Included with this form must be a complete breakdown of the request.
- 2. At the next regular meeting of the Financial Board, a hearing will be conducted with representatives of the organization. The Financial Board will determine if the proposal constitutes program, supplementary, emergency or capital funding. See Article VII on Financial Board Operations.
- 3. The Financial Board shall have the right to negotiate the request amount with the organization but may only change the request amount if the organizational representatives concur. If the request comes before the Senate the Financial Board shall also have the right to recommend an amended amount to the Senate, but if the organizational representatives do not concur, such an amendment must be formally voted upon the Senate floor.

- 4. At the Senate meeting, the Special Funding Bill shall be moved by the appropriate Assistant Treasurer. Prior to any vote, the Undergraduate Student Government Association Treasurer shall report the recommendation/discussion of the Financial Board and the current available balance of the Student Government Reserve.
  - 5. In the case that a special funding request exceeds five-thousand dollars (\$5,000.00), funds will be awarded upon the passage of a two thirds (2/3) vote of the Senate. All other allocations shall only require a majority vote of the Senate.
  - 6. Moneys awarded in the special funding process are subject to the review of the Committee on Fiscal Responsibility and Assistance.
  - 7. Denied requests may not be resubmitted in part or in whole by either the original organization or another organization. They may also not be resubmitted as part of the SGA Sponsorship Funding process. Either of these rules may be waived by a majority vote of the Senate.
- C. Supplemental and emergency funding requests related to the operation of the Undergraduate Student Government Association shall be taken form the Student Government Reserve upon approval of the Senate per the recommendation of the Committee on Appropriations.



# Appendix B:

Treasurer's Workshop

## The Art of being a Treasurer 101

How To Fill Out Those Forms and the OCFC Process

Belin Beyoglu SGA, Chair of Committee on Appropriations



## BUDGETING PROCESS (OCFC)

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#### **OCFC** Timeline

- · B term:
  - Week2: Budget packets are distributed
  - Week4: Nomination for club representatives for the OCFC board are due. OCC meeting takes place for presidents and treasurers, where the nominated person is reported to SGA
  - Week5: Lottery for committee representatives takes place, 5% Rule appeals are due
  - Week7: Budget packets are due back to SGA
- C term:
  - Week2-3: OCFC training for representatives and meetings take place
  - Week5: OCFC recommendations are due
- D term:
  - Second Senate meeting: Budgets are voted on

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### 5% Rule



- Any organization is only allowed to budget for 105% of their previous budget
- Unless they appeal to the 5% Rule and receive approval from the Budget Board
- Common if the organization:
  - Increased membership
  - Is doing a new event
    - This has to be tried in the past either through supplemental SGA funding or outside funds
- Write a letter explaining why your club should get more then 105%,and submit by the given deadline

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## How to Prepare...

When preparing the budget packet:

- Be aware of all expense
- Have last year's budget as a reference
- Talk to the previous treasurer
- Make sure to cover all predicted costs
- Prepare a decent presentation to the OCFC, supporting all the reasoning behind your cost estimates
- If you are not sure of something, don't assume, ask us

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### **Rules of Thumb**



- Only 1 food meeting allowed per semester
- At least ½ of club T-Shirts should be covered by the club
- Only include Annual Expenses
- New events should be SFRd for, not budgeted
- Playoffs cannot be budgeted for, should be SFRd later if the team makes it
- Use the rates given by SGA when calculating Campus Police, Plant Services and Transportation

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## RESOURCES FOR

YOU

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## sga.wpi.edu





#### Includes:

- Special Funding Request
- Senate Sponsorship Fund
- Re-Classification
- Semester Reports
- Financial Record Keeping
- Cash Receipt (Deposit)
- Check Request
- Expense Report (Reimbursement)
- Inter-Departmental Transfer (IDT)

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# SUPPLEMENTAL FUNDING FORMS

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## **Supplemental Funding Forms**

- SFR: Special Funding Request
  - For clubs recognized by SOC (Student Organization Council)
- SSF: Senate
   Sponsorship Fund
  - Any member of the WPI community
- •All forms can be filled out and printed from **sga.wpi.edu** (Or picked up at the SGA office (CC 313))
- •All forms need to be submitted by Wednesdays NOON the latest, and must be signed by a Senator
  - •Once submitted, the request will be brought up to the Financial Board
  - •Financial Board meets on Wednesdays, 4pm-6pm

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#### Special Funding Request (SFR) Class I: Special Interest - Eligible to SFR for EVENTS and **EQUIPMENT** Class II: Club Sports Eligible to SFR for EVENTS and STUDENT GOVERNMENT ASSOCIATION **EQUIPMENT** SPECIAL FUNDING REQUEST (SFR) Class III: Campus Wide Eligible to SFR for EVENTS and **EQUIPMENT** WPI Account Number: Class IV: Non-Budgeted SGA Classification Class I Class II Class II Class III Chib Story Charters Wide Eligible to SFR for Campus Wide O Class IV O Class V O Class VI **EVENTS** only

EVENTS only

Worcester Polytechnic Institute

**EVENTS** only Class VI: Provisional

- Eligible to SFR for Campus Wide

- Eligible to SFR for Campus Wide

Class V: Greek

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## SFR (cont'd)



- Please be specific about the purpose of your request
- Make sure you have an exact breakdown of all costs
- Must include a contact person with appropriate information

Please provide a detailed expense breakdown in Total Amount Requested: \$	 I pages if necessary.
Contact Person: (Person to be contacte	и Бу.
	 WPI Box:



## Senate Sponsorship Fund 644



- Requires a Senator sponsorship
- · Be specific regarding the event's purpose
- Be prepared to provide **EXACT** breakdown of all expected costs

Senate Sponsorship Funding (SSF) Request			
Se	enate Sponsorship	Funding (SSF) F	Request
This form is to be filled our by for finaling f	a Member of the Worcester Polytec for a panticular activity, event, or the	finic Institute Community with a like open to the entire WFI under	Student Government Association Senate rgraduate student body.
Date Submitted:			
ORGANIZER.	BOX#	19900/E	EMAIL
SENATOR	# 20st	PHONE	EMAIL.
Activity:			
Learny.			
	W NEEDED, CONTENTS	IO A SEPALATE DOCUMENT	
	9 MEDIS, CONTANT	REA SEPARATE DOCUMENT	
	# NHEORS, CONTINUE	RVA SEPARATE DOCUMENT	

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## Follow Up



- Upon receiving the Funding requested, expect an e-mail from the Chair of Committee on Fiscal **Responsibility and Assistance**
- The e-mail will have a SFR/SSF Report Form attached
- Fill out this form ASAP after your event/purchase in order to be able to SFR again
  - Be honest, provide real costs, receipts. If you have utilized less then you were awarded, the funds should be available for other organizations
  - Let us know how successful it was, so we would have it as a reference when other clubs come around asking for similar things



### **Re-Classification**

- If you feel that you don't belong to your assigned class, you may file the Re-Classification form
- Specify your present class, and your desired class, with a supporting explanation of your reasoning

To request Reclassification, complete the fo	ECLASSIFICATION R flowing form and submit it to the SGA Treasur as Office. If you need assistance, please counts	er's mailbox in the SGA office or to the SGA mailbox in the
Organization Name:		Date:
Current SGA Classification:	Class I Class II Special Innerest Club Sport	Class III Campus Wide
	○ Class IV ○ Class V Social Greek	Class VI Provisional
Reclassification Request:	Class I Class II Special Innerest Club Sport	Class III Campus Wide
	○ Class IV ○ Class V Social Greek	Class VI Provisional
Purpose of the Request:		
	easons your club wishes to be reclassified. Am	ch additional pages if necessary.
Contact Person: (Person to be contact		
	Email	WPI Box:

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## ACCOUNTING FORMS

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## **Check Requests for Contract Entertainers**



- Check Request Timeline
- 15 Days Prior to Event
  - Contract signed by artist and your organization's advisor
  - Fill out Check Request online.
  - Print out the completed form
  - Make a copy of Check Request and Contract for your Organization's records.
  - The TREASURER should sign "Originator's Signature" line.
  - Paper clip contract and check request together and deliver to SAO.

		WPI Check I	Request		
()	luthon.zation fe	or payment, verification	For Accounting 1		
PLEASE TYPI	OP DRINT		For Accounting C	ise Only	
Payable to:			Due /		
Remit to Address	ě.		Docif		
			V#		
			Seq#	1099. Y or N	
Tax ID# / Social 5	Security #:		PO Number	Memo:  are separate request)	
Mail wiencloss	ile.		iend to WPI Box		
Send to Dept	15 miles	thoristi Life	all@	Extfor pick-up	
Purpose / Descri	ption				
Attach documenta	ntion and origin	nal receipts			
INVOIC	E#	INVOICE	DATE	AMOUNT	
1100000000				12 3000 12 COV	
			- 8 8		
FOAPAL Dist	ribution: 0.6	og katoma er multigde (copole)	Total:	0.00	
FUND	ORG	ACCOUNT	ACTIVITY	AMOUNT	
	11100000			THE CONTROL OF THE CO	
			20 000		
		-			
	Total of in	voices meet oped total fregul	distance Total:	0.00	
Recision to of travel at	bunges; I woner to a	odrani na	emanustration to		
exposes reportupos ao If not setfled milita ou-	unphetion of trip or days from date I rec	expenditures.			
advance or return from amount from my payed	tursel WPI may des Lubrick	doct the	Francial Manager App	nord Date	
Originator Signature		Date	Costniller's Office App	ered Date	17

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## **Check Requests For Contract Entertainers (cont.)**



- Be sure the following are correct:
  - Artist or Agency
  - Address
  - Social Security
     Number (Artist)
  - Handling Instructions
    - · Use "Send to Dept."
    - "Your Organization c/o Student Activities"
  - Description (Date/Name of Show)

	(Authorization for payment, verification
PLEASE	TYPE OR PRINT:
Payable to:	Vince Fleck And The Peritos
Remit to A	ddress:
	inut Street ipstead, NY 11552 -3117

If payment to non-employee individual / partnership Tax ID# / Social Security #:

SPECIAL HANDLING INSTRUCTIONS: (CI	heck des □ Sen
Send to Dept. SocComm c/o Student Activities	Cal
(do not abbreviate)	3 <del>3 31</del>
Purpose / Description:	
CoffeeHouse Show on February 18, 2003	

By submitting request 15 days prior and having it sent back to SAO ensures you will have your check in time for the actual performance.

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## Check Requests For Contract Entertainers (cont.)



INV	OICE #	INVOICI January 20, 2003	E DATE	AMOUNT 775.00
FOAPAL FUND 817850	Distribution: (M ORG 72810	ay list one or multiple foapals)  ACCOUNT  7646	Total:	775.00 AMOUNT 775.0
		nvoices must equal total foupal	Total	775.00

- Invoice Number Leave blank or type "Contract"
- Invoice Date Date the Contract Is Signed
- Amount Amount stipulated in the contract
- Fund Your organizations specific 5- or 6-digit code
- Org Your organizations specific code
- Use 7646 as the Account Number for all Programming

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#### **Check Requests for Invoices**



- Be sure the following are correct:
  - Company Name and Address
    - Take both directly from the invoice.
  - Check Invoice for a Tax ID Number
    - ex: 27-9568813
  - Check off "Mail w/ Enclosure"
  - Under "Purpose /
    Description", type in your
    organizations name
    (capitalized) and be as
    specific as possible when
    describing the event.

WPI Check Request (Authorization for payment, verification of receipt

| PLEASE TYPE OR PRINT: | Due | PRINT: | Payable to: Crown Plaza Worcester | Doc# | Do

If payment to non-employee individual / partnership
Tax ID# / Social Security #: (if Cru
PO Nu

SOCIAL COMMITTEE COFFEEHOUSE: Artist Hotel Charge (2-13-03)

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#### **Check Request for Invoices (cont.)**

- Invoice # Check the Invoice... It's on there!
- · Invoice Date That's also on the invoice.
- · Amount It's usually the largest dollar amount on the invoice.
- Multiple Invoices If you have multiple invoices from the same company... throw them all on, you're saving three pieces of paper. Each Invoice receives its own line.

Attach documentation and ori	INVOICE I	NATE	AMOUNT
		JAIE	
RG 7810001253	January 15, 2003		895.00
9	_		
Š			
	= -		
FOAPAL Distribution:	(May list one or multiple foapals)	Total:	895.00

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#### **Check Request for Invoices (cont.)**



- Fund and Org same as for Contract Entertainer
- Account is 7646 for Programming only... if it's not programming, please refer to http://www.wpi.edu/Admin/Acc/SAO/codes.html
- Double check the amount to make sure it's equal to the charges on the invoice(s).

FUND 817840	ORG 72810	ACCOUNT 7646	ACTIVITY	AMOUNT 895.00
]	= -			
	-	-		
	Total of in	nvoices must equal total foapa	distribution Total:	895.00

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## Account Codes (most usually seen on a check request)



- 7647 Competition Costs
  - Motorsports paying to race their cars in a competition
  - SMAS paying a registration fee to compete in a live action role playing game
- 7181 Equipment
  - LnL purchasing new lights
  - TechNews purchasing a camera
- 7185 Equipment Rental
  - CSA rents DJ equipment for an event
- 7731 Other (Description Required)
- 7131 Postage
  - SocComm pays FedEx for sending a contract overnight
- 7646 Programming
  - Any contract entertainer or other purchased service that is an event
- 7651 Safety
  - Pershing Rifles purchasing a First Aid Kit
- 7311 Travel
  - SAS takes a bus of students to see Templeton, MA

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#### **Inter-Departmental Transfer**



#### What an IDT is:

 A document authorizing a transfer of funds between two or more organizations on campus.

#### When an IDT is most commonly used:

- Charges for Campus Police, Lens and Lights, or Plant Services
- SGA allocating additional funds to your organization through an SFR

#### Other situations include:

· When co-sponsoring an event with an organization

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## Inter-Departmental Transfer from Campus Police, Facilities Services, and Lens and Lights

#### Facilities Services

- · Facilities Services will send to your organizations' mailbox their own IDT
- You are responsible for filling in your organization's Fund and Org number and submitting it to SAO
- Use Account number 71972

#### Campus Police

- · Campus Police will send to your organizations' mailbox their own IDT
- You are responsible for filling in your organization's Fund and Org number and submitting it to SAO
- Use Account number 71971

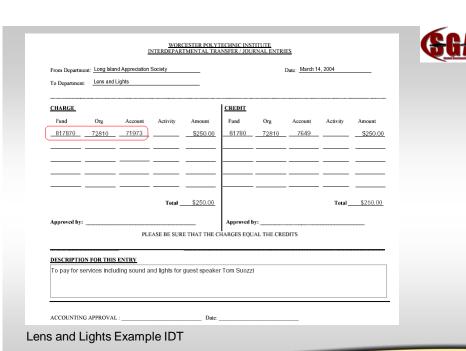
#### Lens and Lights

- Lens and Light s will send to your organizations' mailbox their own IDT
- You are responsible for filling in your organization's Fund and Org number and submitting it to SAO
- Use Account number 71973

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#### **Worcester Polytechnic Institute**





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# 

#### The Expense Reimbursement



Name – Person to be reimbursed Address – Person's WPI Box, Local Mailing Address or Home Mailing Address Organization – The Organization Holding the event Specific Program – e.g., Quadfest, Pride Dinner, LAN Party

#### **SECTION 1 – MILEAGE REIMBURSEMENT**

In this example:

- •The person drove 99 miles.
  - •Auto Mileage Charge is automatically calculated
- •Any costs incurred from public transportation (Commuter Rail / Mass. Pike), will go under the following section.

Name:	Name: Sean Connolly		Address: WPI Box 1101			
Organiz	ation: IKEA Appreci	ation Society	Specific Program:	IKEA Day 2	2004	
		Mileage Rein	bursement			
Date	From	To	Mileage	Rate	Total	
	Worcester, MA	New Haven, C	T 9	9 \$0.32	\$31,73	
	New Haven, CT	Worcester, MA		9 \$0.32	\$31,68	



#### The Expense Reimbursement



#### Section II - Other Reimbursements

- •For public transportation (in the case, Mass. Pike), be sure to ask for receipts.
- •Date Date on Receipt
- •Name of Vendor Same as on Receipt
- •Description Be as specific as possible
- •Total Use the amount on the receipt. Multiple receipts from the same vendor should appear as separate items in the listing. In this example, there is a receipt from IKEA for the furniture and from IKEA for the food.

		Mileage Reimburseme	nt			
Date	From	To	Mileage	Rate	Total	_
8/30/04	Worcester, MA	New Haven, CT	100	\$0.32	\$32	
	New Haven, CT	Worcester, MA	99	\$0.32	\$31	.68
	0	ther Reimbursements (Attacl	h Receints)			
Date	Name of Vendor	Description			Total	
	Mass Pike	Toll Charges			\$2	
8/30/04	IKEA	Desks, Tables (as pri:	zes)		\$180	
8/30/04	IKEA	IKEA's Sweedish Mea	atballs		\$20	00
						-
						H
						H
			otal Reimbursen		\$266	-

The total amounts from Section I and Section II are automatically totaled by Acrobat and appear in the "Total Reimbursement" Box.

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**Worcester Polytechnic Institute** 



#### The Expense Reimbursement



#### **Account Distribution**

Account Distribution

		Mileage Reimburser	nent		
Date	From	To	Mileage	Rate	Total
8/30/04	Worcester, MA	New Haven, CT	100	\$0.32	\$32,00
	New Haven, CT	Worcester, MA	99	\$0.32	\$31,68
0100701	I TOW HOVEN, OT	11101000101, 1401			

Other Reimbursements (Attach Receipts)				
Date	Name of Vendor	Description of Charges	Total	
	Mass Pike	Toll Charges	\$2	70
8/30/04		Desks, Tables (as prizes)	\$180	
8/30/04	IKEA	IKEA's Sweedish Meatballs	\$20	.00

Total Reimbursement:

Activity/

In this example: •7646 – Program

- •7646 Programming
  - •This included only the desks and tables given as prizes.
- •7222 Food
  - •This includes only the meatballs. All food goes under account 7222, even if it is not from Chartwells
- •7311 Travel

\$266.71

•This includes Gas and tolls. It could also include MBTA or Taxi

Although the "Total Reimbursement" Box is totaled by Acrobat, there is no check to see if the distribution totals the same as the reimbursement amount. Please double check.

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#### **Expense Reimbursements**

- Copies of Receipts and Reimbursement Forms
  - The organization should keep a copy of all forms and receipts submitted.
  - If the reimbursement needs to be initialed by the SGA Treasurer as previously mentioned, an additional copy should be made for the SGA Treasurer's records
- Place the completed with all receipts paper clipped (not stapled) together
  - Place completed form with receipts and ONE copy of the form to SAO if it does not need to be initialed by the SGA Treasurer
  - Place completed form with receipts and TWO copies of the form to the SGA Treasurer if it does need to be initialed by the SGA Treasurer. (CC313)
    - The SGA Treasurer will initial the form and pass it along to SAO

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**Worcester Polytechnic Institute** 



## Expense Reimbursements Account Codes



- 7185 Equipment Rental
  - A KSA member paid out of pocket for DJ equipment
- 7731 Other
  - Be as descriptive as possible
- 7131 Postage
  - A BiLaGA members paid out of pocket for stamps
- 7111 Supplies
  - A SocComm Member paid out of pocket for markers and crayons
- 7311 Travel
  - Used to pay off reimbursements from Section I

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Dept:	Prepared by:			Cash Receipt For
Please identify the type of the depos if Gift Related, please complete Se if Non-Gift Related, please comple	it. ction I and send to Gift Recording to Section II and send to the Tre	asury Office.		(Deposits)
Section I: Gift Related     Fellowship     Scholarship	☐ Program Support ☐ Research Advancement	Required Docume  Commitment  Invoice on Fil	ntation: (select one) Letter le in Accounting	Date: date deposit prepared Dept: your organization's name
☐ WPI Event/Conf. Sponsorship  For University Relations Entry:  Fund Org A	Mass Academy Parents Fund Other  Activity/	Proposal on F Foundation  Cash/Check Received From*		Prepared by: person who counted mo
Pulla Org A	Location Location		sal \$0.00	SKIP SECTION I!
Section II: Non-Gift Related     Sponsored Internship   Fac   Core     Research Center Fee   Core     Sponsored-Project Fee   Sam	ility/Equip Usage aference Registration arner Camp Revenue	Required Documenta	tion: (select one) le in Accounting ile in Accounting	Section II  Check off "SAO Deposit"  Your Fund and Org
☐ Sponsored-Project Fee ☐ Sun	nmer Camp Revenue nission/Grad Adm/Registrar Fees ense Reimbursement nsored Research Grant	Contract on F Commitment Other	ile in Accounting Letter	Your account is "7649" for fund raised income
Please credit the attached check(s) and/ Fund Org /	or eash to the following fund(s)  Activity/ Location	Cash/Check Received From*	Amount	<ul> <li>If this is a check, indicate so with a n</li> <li>If this is ticket sales, indicate that as</li> <li>You can leave Activity/Location blank</li> </ul>
	onsored Research fund has been ve	rified by		ALL CHECKS MADE PAYABLE TO
The Treasury Office will issue receipts to departs and not be sent through compass mail. When make placed on your copy of this form.	nents irroups only for CASH deposits. Such d	eposits should only be hand-earric	od to the Treasury Office	



Please credit the attached check(s) and/or cash to the following fund(s)   Fund   Org   Account   Location   Received From*   Amount		Cas		eposits)	Example		
Fund	Spoi	nsored Internship earch Center Fee nsored-Project Fe ■ MQP ■ IQP ■ GQ ■ MQP ■ IQP ■ GQ Deposit	Facility/Equip   Conference Reger   Summer Camp   Admission/Gra   Expense Reimb   Sponsored Reserved   Other	gistration Revenue d Adm/Registrar Fee ursement earch Grant	☐ Invoice on File in Contract on File ☐ Commitment Let	Accounting in Accounting ter	<ul> <li>Ticket Sales as cash</li> </ul>
### Stranger   ### St	Fund	Org	Account			Amount	
### Stranger   ### St	817870	72810	7649		Ticket Sales (Cash)	\$500.00	<ul> <li>Ticket Sales from</li> </ul>
*List name for each check. If more than (4) provide a tape listing  Total \$965.00  *List name for each check. If more than (4) provide a tape listing  The above Restricted/Sponsored Research fund has been verified by  **Counting Signature*  **The Treasury Office will issue receipts to department/groups only for CASH deposits. Such deposits should only be hard-carried to the Treasury Office and not be sent through campus mail. When making a cash deposit bring two copies of this form to the Treasury Office where a receipt stamp will be relief to the county of this form.	17870	72810	7649		Levin's Pharmacy (Sponsorship)		
*List name for each check. If more than (4) provide a tape listing  Total  S965.00  The above Restricted/Sponsored Research fund has been verified by  Accounting Signature  Accounting Signature  The Tenany Office will issue receipts to departments/groups only for CASH deposits. Such deposits should only be hand-carried to the Treasury Office and not be sent through campus mail. When making a cash deposit bing two copies of his form to the Treasury Office where a receipt stamp will be	17870	72810	7649		Russ Oja (Alumni Donation)	\$300.00	a cneck
The above Restricted/Sponsored Research fund has been verified by  Accounting Signature	17870	72810	7649		John Deerkowski (Ticket Sales)	\$15.00	
and not be sent through campus mail. When making a cash deposit bring two copies of this form to the Treasury Office where a receipt stamp will be		The above Resti	ricted/Sponsored Re	search fund has bee	en verified by	nature	-
34	and not be sent t	hrough campus mail.					2
							34





## Cash Receipt Form (Deposits)

#### Procedure

- 1. Check and double check to insure proper amounts are on forms
- 2. Make two copies of the cash receipt
- 3. Take BOTH copies with you to SAO to have them signed by an SAO Staffer
- 4. Then take BOTH copies to the Treasury Office, Boynton Hall, 2<sup>nd</sup> Floor
- 5. Ask to keep one copy as your receipt.

#### Fund Raised Income

- · Should be deposited within three days of receiving income
- SAO can provide a secure place for your money, if you can't make the deposit right away

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## **RECORD KEEPING**

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**Worcester Polytechnic Institute** 

WPI

## The Importance of Keeping **ACCURATE** Records



#### Possible tools to keep records

- Easiest
  - Microsoft Excel
- Alternate Options
  - QuickBooks
  - Microsoft Money
  - Quicken
  - And Others

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#### **Example Spreadsheet** Microsoft Excel - Book1 File Edit View Insert Format Tools Data Window Help 🛄 🖭 🖒 🖾 🧓 🀚 🐚 [[] 🔼 🐚 [] 🏥 🛍 🖺 🔁 🗀 🗀 | 🗀 Reply with Changes... End Revie £ =5000-SUM(B:B) Club X Budget Balance 4125 Expenditure Amount Tournament Entrance Fees \$100 Bus to Tournament \$300 6 15 Jerseys \$475 7 etc 8 **Worcester Polytechnic Institute**

# Why keeping ACCURATE records is important

- Keep your account balance out of the red...
  - Access to your budget
  - Access to SFRs
- Able to utilize your budget to its fullest extent

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#### **More Info**



- Get a Account Update from SAO
  - cross check this document with your records
- Plan ahead
  - Certain costs are incurred after the event/purchase





## **Record Keeping Sheet**

- Record Keeping Excel File @ sga.wpi.edu
- Example Record Keeping Sheet

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## **SEMESTER REPORTS**

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WPI

## **Semester Reports**

- A form that should be filled out by all clubs to show clearly how the budget was spent that semester
- This document will give us an idea of how fiscally responsible your club is
- It is good to be fiscally responsible!

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- Available online at the SGA Website: http://sga.wpi.edu/
- E-mail sent out second week of B/D
  Term, reminding you that you need to
  complete a Semester Report
  - The email will include the due date
  - It is a universal form-each class will complete the same form.
- Write in the gray shaded boxes, they will expand





- If you make a purchases after the academic semester has ended.
  - put a projected cost for those purchases
  - If anything changes for your projected cost, send the new information to the Chair of the Committee on Fiscal Responsibility and Assistance (CFRA)
- When submitting
  - The more preferred option is to save to word document are email that to the Chair of CFRA.
  - If you have any issues or if you have extra information to include, bring the report to the SGA office

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#### References

**GGA** 

- William L. Herbert, The Treasurer's Workshop
  - Treasurer Emeritus: The WPI Social Committee
  - Former Assistant Treasurer: Student Government Association

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WPI



# Appendix C: Events Planning Guide

#### Office: Campus Center, Entry Level, Rooms 257-258 Contact information x 5613 or events@wpi.edu

James Kenary, Events Program Manager, x5022 or <u>ifkenary@wpi.edu</u>
Cathy Battelle, Events Coordinator, x6150 or <u>clb@wpi.edu</u>

#### Planning your event at WPI

Do you need facilities for a special event, a staff meeting, workshop, lecture, or celebration? If so, let the Events Office help you find the right location for your function. It's simple, just contact us *at least two weeks prior* to your event. More advance notice may be necessary depending on the scale of your meeting/event.

Proper planning will help make your event a success. When booking an event please have the following information;

- The **date** and actual **time** of the event
- Expected attendance
- **Title** of your event
- Desired **equipment** and **set up** preferences (It is important to note you will be having A/V at your event at the time you reserve your space in order for proper set and break down time may be added).
- Menu and/or beverage choices if catering is requested, (It is important to note you will have food at your event even if you don't know the menu at the time of reserving a room so we may reserve the correct space and time needed for your event).
- WPI account number or billing address

Submit this information to our office through the Events Reservations Request Form which can be found at <a href="http://www.wpi.edu/Admin/Events/form.html">http://www.wpi.edu/Admin/Events/form.html</a>. Please note: reservations are not final until confirmed by the Events Office, either by telephone or e-mail. You should hear from us with-in two business days.

**Please note:** Campus facilities and services are available primarily for activities which implement or complement WPI's educational, social, and cultural goals. Good taste, consideration for the rights of others, and common sense are the determining factors when granting permission for the use of facilities. Most non academic space on campus can only be booked through the Events Office. The Events Office managers WPI space and will make the determining decisions relative to the time and location of your event.

#### **WPI Event Venues**

#### Meeting Rooms and Halls

Location	Seating Capacity
Campus Center Peterson room	12
Campus Center Taylor room	16
Campus Center Chairman's room	20
Campus Center Morgan room	18
Campus Center Mid-Century room	20
Campus Center Hagglund room	46
Campus Center Odeum A, B, & C	
(1-section)	80 with Rounds / 143 Theater Style Seating
Campus Center Stage	
Higgins House Great Hall	56
Higgins House Library	32
Higgins House Sun Porch	24
Higgins House Dining room	28
Higgins House Suite One	12
Founders Country Kitchen	40
Founders Study	80
Founders B	20
Founders A	30
Alden Hall	300
Riley Commons	100
Forkey Conference room	20
Beckett Conference room	16
Quadrangle	

#### **Classrooms & Lecture Halls**

Classrooms or lecture halls are booked through the Projects & Registrar's Office

Office: Boynton Hall 1st floor

Contact: Chuck Kornik, Administrator, Academic Programs

X 5457 or cjkornik@wpi.edu.

#### **Athletic Facilities**

Reserve athletic facilities through the Athletic Office

Office: Alumni Gym

Contact: Jason Steel. Faculty Coordinator x 6133 or <u>jsteele@wpi.edu</u> Athletic Department web site, <u>wpi.edu/Academics/Depts/PE/Facilities</u>

#### **Service Providers**

The Events Office will be happy to arrange your menu items using the Campus Catering Guide, which can be found at <a href="https://www.dineoncampus.com/wpi/?cmd=catering">www.dineoncampus.com/wpi/?cmd=catering</a>, and your standard equipment reservations and set up. However, you should contact the following service providers directly if you have any special needs etc: special menu requests, extensive set up, technical questions, or cost related information.

#### The Academic Technology Center (ATC)

Fuller Labs 1<sup>st</sup> floor x 5220

Steve Hemming, Manager of Campus Media Services, x 6772 or <a href="mailto:shemming@wpi.edu">shemming@wpi.edu</a> Visit their web site at, <a href="mailto:www.wpi.edu/Academics/ATC/Facilities">www.wpi.edu/Academics/ATC/Facilities</a>.

<u>Campus Media Services</u> is responsible for the audio/visual management and support required by campus event planners as well as the day-to-day support of electronic classrooms, conference rooms and the ATC's comprehensive inventory of loan out equipment.

For a meeting/event taking place during the ATC's standard hours of operation, the ATC requires a **minimum of four business days advance notice** to assure that the necessary resources are available. For a meeting/event taking place outside the ATC's standard hours of operation, ten business days notice is required to secure the personnel and equipment needed for your event. Without sufficient advance notice, the ATC cannot guarantee service. The ATC will attempt to accommodate all needs regardless of how much advance notice it receives. If on the rare occasion due to short notice, the ATC is unable to provide the required staff support to deliver and/or set-up needed A/V, the customer may still be able to stop by the ATC and get the equipment they need if it's available.

Currently, the ATC does not provide staff support for the delivery, set-up, or take-down of equipment for student requests/events.

#### **Food Service**

Campus Center 1<sup>st</sup> floor x 5700 Bill Battelle, Catering Manager, x 6047 or <u>battelle@wpi.edu</u> Visit their web site at, <u>www.dineoncampus.com/wpi/?cmd=catering</u>

Chartwells is the contracted food service provider for the entire WPI Community and must be used for all functions where food and beverages are served.

Events should be planned as early as possible through the Events Office. Events booked with less than 3 business days will be subjected to a 20% late charge. A \$25.00 minimum charge is required for all catered events.

Coffee Service or Breaks 3 Business Days (minimum)

Breakfasts, Lunches & Dinners 7 Days (minimum)

Final Counts/Guarantee 3 Business Days (minimum)

#### **Plant Services**

Daniels Hall basement level x 5500
Terry Pellerin, Associate Director, 27 Hackfeld Road x 5133, or <a href="mailto:pellerin@wpi.edu">pellerin@wpi.edu</a>
Bobby Pepin, Daytime Supervisor, x 5575, or <a href="mailto:rpepin@wpi.edu">rpepin@wpi.edu</a>
Gary Antinarella, Nighttime Supervisor x 6707 or <a href="mailto:gary@wpi.edu">gary@wpi.edu</a>
Visit their web site at, <a href="mailto:www.wpi.edu/Admin/Plant">www.wpi.edu/Admin/Plant</a>

Custodial hours are from 5:00am to 11:00pm Monday through Friday. During these hours, the WPI community will not incur additional costs for setup and breakdown of meetings and seminars for groups under 50 people. Programs for groups over 50 people may incur setup charges in addition to rental charges. Please contact the Events Coordinators office at 508-831-6150 for applicable charges. Events, meetings, seminars and conferences held outside the hours noted above will incur an additional charge for custodial services. For a WPI sponsored events the current charge is \$26.30 per hour with a 4 hour minimum. Groups using the same venue back to back requiring separate setups will share in the total cost of setup and breakdown and any additional cleaning charges. If you find that you need to move furniture

around in a room, we ask that you to return the room to its original setup. If the room is not returned to its original condition, a reset charge will be billed.

#### **Campus Police**

25 Dean Street non-emergency x 5433 Captain Rod Beaton, Associate Director, Public Safety, X 5433 or <u>rjbeaton@wpi.edu</u> Visit their web site at, http://www.wpi.edu/Admin/Police/

The Events Office will advise you if Campus Police will need to be involved in your event. The host is responsible for any charges that accrue. For a WPI sponsored events, the current charge is \$35.00 per hour with a 4 hour minimum. A Campus Police Office is required for the following;

- Events with an excess of 100 guests, depending on the nature of the event (some events with less than 100 guests may also require an Officer.
- > Events offering alcoholic beverages.

#### **Additional Information**

#### **Billing**

Internal events are billed directly to your organization by the appropriate service provider. External groups and personal functions are billed through the Events Office. Credit card payments maybe made directly to the Accounting Office at 508-831-5754.

#### **External Groups**

Some facilities are available for persons or organizations outside the WPI community for a fee. The Events Office reserves the right to interpret the definition of an on-campus or off-campus group. (Note: A group is not considered on-campus because a member of the WPI community initiates the request). Visit our web site at wpi.edu/About/Visitors.

#### **Personal Functions**

Faculty, staff, students, and alumni may reserve the Higgins House or the Campus Center Odeum for personal functions (wedding, anniversary, or shower). Please contact the Events Office for additional information.

#### **Student Groups**

For student events approval and assistance with advertising your event, contracts, or budget information, please contact the Student Activities Office, x 5291or <u>SAO@wpi.edu</u>. The Student Activities Office is located on the 3<sup>rd</sup> floor in the Campus Center.

Please note the following; in some cases you may require a hold on more than one date for your event, we will be happy to see what is available but due to the overwhelming need for space we cannot hold the dates for more than 7 days. If we do not hear from you with in that time, both dates will be cancelled. Also your **event information is needed <u>two weeks</u>** prior to your event, if information is not received to the Events office before 5 business days we will not be able to service your requests.

#### **Table Requests**

Campus Center, Quad, or Fountain area table sitting needs please contact Kim Wykes x 6806 or <a href="mailto:kwykes@wpi.edu">kwykes@wpi.edu</a>.

#### Signage

The Campus Center Director's office will be glad to assist you with your event poster needs. Contact Kim Wykes x 6806 or <a href="mailto:kwykes@wpi.edu">kwykes@wpi.edu</a>. Forward a copy of your design in an 8 ½ x 11 word document. She will have your poster created. Pick up your finished posters at the Campus Center office. The Campus Center Director's Office is located on the main level at the Campus Center. The cost of each poster is \$3.00.

#### **Political Events**

WPI will host only *non-partisan* political events, depending on campus availability of space.



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Appendix D:

Sample Forms

#### **Student Organization Request for Locker and File Cabinets**

Date:	<del></del>			
Name of Club or Or	ganization:			
Please state the rease	ons why your club or organization n	eeds locker and file	space in the Camp	ous Center.
How long has the cl	ub been active at WPI?			
How many students	are active members of the club?			
Where does your clu	ub presently keep your organization'	s belongings and fil	es?	
What activities or pr	rograms has your club sponsored du	ring the current scho	ool year at WPI?	
Please list the currer	nt officers of the club:			
	<u>Name</u>	<u>Email</u>	<u>Telephone</u>	Mailbox
President				
Vice President				
Treasurer				
Secretary				

#### **Organization Photocopier Contract**

The Student Activities Office maintains the photocopier in the Student Organization Suite on the third floor of the Campus Center. All recognized student organizations that have an account in the WPI accounting system are eligible to obtain a photocopier account. Each organization is assigned a unique copier access code, and the copy count is kept electronically by the machine.

Any organization wishing to obtain a photocopier account may do so by completing and returning this form to the Student Activities Office. By returning this form, your organization is accepting the following photocopier account policies:

- A statement will be sent to your organization at the end of each WPI term for all photocopies made since the last billing period, at the rate of five cents per copy. This statement is for your records. The Student Activities Office will charge each organization's account the amount in the statement.
- The Student Activities Office has the right to verify the identity of and prohibit, if necessary, any individual using a copier access code. If an access code is lost or forgotten, only the president or treasurer may request the code again. If the copier access code is suspect of unauthorized use, an organization may request a change in code immediately. All codes are reassigned at the beginning of each academic year.
- Either party may terminate the contract at any time for any reason by notifying the other party. If terminated, all outstanding charges will be transferred immediately.

Organization:			
Date:Username Ass			Org:Date Assigned:
Signatures:	Organization President: Organization Treasurer: SAO Staff Member:	Date:_ Date:_	_Date:

#### **Using the Copy Machine:**

- 1. Enter your USERNAME and PASSWORD.
- 2. Hit the "ID" button.
- 3. Make copies as usual.
- 4. When finished, hit "ID" once more, to clear your account so that no one else may make copies under your organization's account.

#### WPI STUDENT ORGANIZATION OFFICER UPDATE FORM Student Activities Office 2008-2009

Please complete this form as accurately as possible. It is used provide contact information about your organization to interested students and departments. Completion and submission of this form is required as part of WPI's ANNUAL recognition process for your organization.

<sub>F</sub>		J J	J	
Name of Club/Organiza	ation	Org:		
Organization WPI Acco Organization E-mail Al	ias (execs only):	Org:		
		Ending N	Month & Year	
Number of members in	organization	Num	ber that regularly attend	d meetings
When are your elections	s held?			e officers?
How frequently are mea			low often do you chang	e officers:
Recognizing Departmen	nt (CCSA, Chem, l	Eng, etc)		
		casionally receives requ	_	
-		mbers, box numbers, or mation on this sheet to l		rganization leaders. Yes/No****
- Во у	ou want the infor	mation on this sheet to	be shareu:	168/140
		LIST OF OFFICE	ERS	
Title resident	Name	WPI Box #	E-Mail	Phone #
ice-President				
ecretary		. <u> </u>		
reasurer				
ther (specify)				
Advisor (s)	N	ame	E-Mail	Phone #
110,1001 (0)				
Coach (if any)				
	this form and retur	rn to: WPI Student Activit		
For Office Use O	Only:		itute Road, Worcester, I <b>m is due to CCSA by O</b>	
Date Received:	Received b	· · · · · · · · · · · · · · · · · · ·	Valid Ur	,

	Name of Organization:	Date:
		I, and support the establishment of this organization.
1)	Name	Local Address
9)		
16)		
17)		
24)		

25)	
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49)	
<b>+</b> / 1	

#### **Anti-Hazing Policy**

#### **Background:**

In December 1987, the anti-hazing legislation, Chapter 269, Sections 17 through 19, was amended by the Legislature in Chapter 665 of the Acts of 1987. The amendment increases the criminal penalties for hazing infractions and alters the manner in which institutions notify individuals of the law.

Specifically, WPI is required to inform groups, teams or organizations of the provisions of M.G.L. Chapter 269, Section 17, 18 and 19, which are below. A club officer <u>must</u> read sections 17, 18, and 19 of this law and pass out a copy to each member of the organization. Once you have shared the information with your organization, sign the bottom of the page and return it to the Student Activities Office. Have all of your members sign the attached sheet.

Not only is hazing against the law, but it is a practice which diminishes the integrity of individuals and their organizations. Hazing is clearly defined below, and has no place in our society, particularly at an institution of higher education.

WPI is committed to emphasizing that all organization activities be made constructive, educational and safe. Therefore, in support of the college's commitment to the mental, emotional and physical well-being of every student, it is the policy of the University and the Commonwealth of Massachusetts that "hazing" in any form be prohibited, and its practices in any fashion be condemned.

## Commonwealth of Massachusetts An Act Prohibiting the Practice of Hazing

Chapter 269 of the General Laws is hereby amended by adding the following three sections: <u>Section 17</u>. Whoever is a principle organizer or participant in the crime of hazing as defined herein shall be punished by a fine of not more than \$3,000 or by imprisonment in a house of correction for not more than 1 year, or by both such fine and imprisonment.

The term "hazing" as used in this section and in sections 18 and 19, shall mean any conduct or method of initiation into any student organization, whether on public or private property, which willfully or recklessly endangers the physical or mental health of any student or other person. Such conduct shall include whipping, beating, branding, forced calisthenics, exposure to the weather, forced consumption of any food, liquor, beverage, drug or other substance, or any other brutal treatment or forced physical activity which is likely to adversely affect the physical health or safety of any such student or other person, or which subjects such student or other person to extreme mental stress, including extended deprivation of sleep or rest or extended isolation. Notwithstanding any other provisions of this section to the contrary, consent shall not be available as a defense to any prosecution under this action.

Section 18. Whoever knows that another person is the victim of hazing as defined in section 17 and is at the scene of such crime shall, to the extent that such person can do so without danger or peril to himself or others, report such crime to an appropriate law enforcement official as soon as reasonably practicable. Whoever fails to report such crime shall be punished by a fine of not more than \$1,000. Section 19. Each institution of secondary education and each public and private institution of post secondary education shall issue to every student group, student team or student organization which is part of such institution or is recognized by the institution or permitted by the institution to use its name or facilities or is known by the institution to exist as an unaffiliated student group, student team or student organization, a copy of this section and sections seventeen and eighteen; provided, however, that an institution's compliance with this section's requirements that an institution issue copies of this section and sections seventeen and eighteen to unaffiliated student groups, teams or organizations shall not constitute evidence of the institution's recognition or endorsement of said unaffiliated student groups, teams or organizations.

Each such group, team or organization shall distribute a copy of this section and sections seventeen and eighteen to each of its members, plebes, pledges or applicants for membership. It shall be the duty of each such group, team or organization, acting through its designated officer, to deliver annually, to the institution an attested acknowledgment stating that such group, team or organization has received a copy of this section and said sections seventeen and eighteen, that each of its members, plebes, pledges, or applicants has received a copy of sections seventeen and eighteen, and that such group, team or organization understands and agrees to comply with the provisions of this section and sections seventeen and eighteen. Each institution of secondary education and each public or private institution of post secondary education shall, at least annually, before or at the start of enrollment, deliver to each person who enrolls as a full time student in such institution a copy of this section and sections seventeen and eighteen.

Each institution of secondary education and each public or private institution of post secondary education shall file, at least annually, a report with the regents of higher education and in the case of secondary institutions, the board of education, certifying that such institution has complied with its responsibility to inform student groups, teams or organizations and to notify each full time student enrolled by it of the provisions of this section and sections seventeen and eighteen and also certifying that said institution has adopted a disciplinary policy with regard to the organizers and participants of hazing, and that such policy has been set forth with appropriate emphasis in the student handbook or similar means of communicating the institution's policies to its students. The board of regents and, in the case of secondary institutions, the board of education shall promulgate regulations governing the content and frequency of such reports, and shall forthwith report to the attorney general any such institution which fails to make such report.

I nereby declare that I have re	ad "MGL c.269, Ss.17, 18 and 19" to the organization,	
	, on	
(organization)	(date)	
Asunderstands and agrees to con	of the organization, I pledge that the organization of this law.	tion
Print your name:		
Signature:	Date:	

#### **Anti-Hazing Signature Sheet**

I hereby declare that "MGL c.269, Ss.17, 18 and 19" have been read to me by one of the

with the provisions of this law.	,
Signature	Date
	organization. As a member of vith the provisions of this law.  Signature

#### **CONSTITUTION FORMAT**

#### Article I. Name

□ State the official name of the organization.

For example: The name of this organization shall be The Unidentified Club.

#### **Article II. Purpose**

- □ State the purpose or goals of the organization. It may be, by definition, academic, cultural, service-oriented, political, religious, etc.
- ☐ The group should not duplicate the ideals of an existing student organization.
- □ If there are similarities, state the unique aspects which characterize the organization.
- □ State any local, regional or national affiliations with any other groups.
- □ State how the organization's purpose is consistent with the College mission.

For example: The primary purpose of The Unidentified Club shall be to unite the Worcester Polytechnic Institute Community in the arts and sciences through events, educational lectures and discussion. This organization will help enforce the mission of Worcester Polytechnic Institute by educating men and women, aiding in the preparation for their future careers, providing an atmosphere for leadership and continuous education.

#### Article III. Membership

- □ Define who is eligible for membership. Membership may only be open to WPI students.
- □ State that membership must be open to all WPI students.
- □ State that the organization will not discriminate on the basis of race, creed, religion, color, age, sexual orientation, disability, veteran status, marital status or national origin.
- □ State guidelines for membership renewal, removal or voluntary discontinuance. Members must have the freedom to discontinue membership at any time.
- State that the organization will ensure that its membership will not practice any physically or psychologically abusive hazing behaviors either intentionally or unintentionally.
- □ State any requirements for membership such as paying dues, academic progress, etc.
- □ State who is eligible to vote in matters concerning the organization

For Example: Membership for The Unidentified Club is open to all WPI Students. Those who maybe be considered active members are individuals who have attended more than two meetings per academic term, who attend at least one event sponsored by the organization and are in good academic standing per university standards. Only those active members and the executive board are able to vote in matters concerning the organization when a vote is deemed necessary by the executive board. The Unidentified Club will not discriminate on the basis of race, creed, religion, color, age, sexual orientation, disability, veteran status, marital status or national origin. The organization ensures that its membership will not practice any physically or psychologically abusive hazing behaviors either intentionally or unintentionally.

Members may discontinue their membership at anytime. Members who are not active at any point in time, may become active upon the recommendation of the executive board or fulfill the requirements of an active member as stated above.

#### Article IV. Officers, Duties and Requirements

- □ Describe the governance structure; is there an executive board?
- □ State the duties of the officers (call meetings, determine agendas, approve expenditures, etc.).
- □ State any requirements for officers (academic progress, extended membership, etc.).
- □ State the organization must have full-time WPI students in good academic standing as officers.

For Example: The Unidentified Club will be governed by an executive board, which includes a President, Vice President, Treasurer and Secretary. Any executive board member will be able to chair an ad-hoc committee as deemed necessary. All executive board members must be in good academic standing at all times during their tenure.

The President will be responsible for the overall supervision of the affairs of the Unidentified Club, will call and preside over all executive board or general assembly meetings, and will work with the Treasurer and Advisor to create the annual budget.

The Vice President will be responsible for all internal affairs of the organization including, performing the duties of President in the absence of the standing President and overseeing elections for the organization.

The Treasurer will be responsible for all fiscal responsibility connected with the Unidentified Club. This individual will work closely with the executive board and advisor to maintain a balanced budget and oversee all paperwork and transactions attached to the Unidentified Club.

The Secretary will be responsible for keeping record of all meeting minutes, the history of the organization and sending out meeting minutes to the executive board, general assembly and advisor.

#### Article V. Meetings

- □ State approximately how often meetings can be held.
- □ State who has the authority to call meetings.
- □ State what quorum is required at meetings (if appropriate).
- □ State how meetings will be run (Parliamentary Procedure, etc.).

For Example: Meetings of the Unidentified Club will be held on a weekly basis and shall be called by either the President or Vice President. When voting is necessary within the organization, quorum or 66% of the organization must be present. These meetings will be governed through Parliamentary Procedure.

#### **Article IV.** Elections & Officer Replacement/Removal

- □ State how officers will be elected, appointed, removed or replaced. It is strongly suggested that elections be conducted by democratic procedures.
- State the time line for elections. Elections for all student organization officers must take place prior to the conclusion of Term C.
- □ State what justifies removal from office.
- □ State the formal process for removal.

For Example: Elections will take place once an academic year in C term, no later than the fifth week through a democratic procedure in the form of a written ballot.

Any general member of the Unidentified club may remove themselves from the organization at any time. Additionally, any member of the Executive Board may resign from his or her position at any time, by submitting written notice to the executive board which will be effective immediately upon receipt of the letter.

Removal from office may be due to the disinterest or resignation of the current officer. In this case, the executive board may execute an interim chair to be assigned to the position by majority vote. If removal is due to the Executive board member failing to perform his or her duties, a vote of two thirds or 66% of active membership is necessary to remove an individual from office.

#### **Article VII.** Judicial Action (Optional)

- □ State the process for disciplining members of the organization.
- State that the organization will abide by decisions of the Campus Hearing Board or its designee, in dealing with charges brought against the organization.

For Example: The Unidentified Organization shall abide by rules and policies of Worcester Polytechnic Institute. The organization shall also accept the decisions of a Campus Hearing Board in dealing with charges brought against the organization should policies be violated.

#### **Article VIII.** Finances

□ State how the organization will be funded (dues, outside sources, SGA).

For Example: The Unidentified Club shall be a Class VI organization, funded by the Worcester Polytechnic Institute Student Government Association.

#### Article IX. Advisor

- State the process for selecting/removing the advisor. For non-Greek organizations, advisors must be full-time WPI faculty or professional staff members.
- □ State advisors will not be given voting rights in an organization

For Example: The Advisor to the Unidentified Club shall be a full time WPI faculty or professional staff member. This advisor shall attend general meetings and meet with the executive board members on a biweekly basis to update and discuss the programs and issued concerning the Unidentified Club. The Advisor however, will not have voting privileges in the organization.

#### Article X. Amendments/Revisions

- □ State the procedures for amending/revising the constitution (posted notices of amendments for two weeks prior to vote, placing an amendment on the floor for two weeks, etc.)
- □ State who may propose an amendment.

For Example: Amendments to this constitution must be made by a majority vote or 66% of active membership. Any proposed amendments must be provided two weeks prior to a vote. Any active member or executive board member pay propose an amendment to the constitution or by-laws.

#### **Article XI. SOC Enabling Clause**

☐ This must appear at the end of the Constitution:

The (name of the organization) agrees to abide by the policies of Worcester Polytechnic Institute as well as all federal, state and local laws. Any changes to this constitution and/or bylaws will follow, in word and spirit, all WPI policies and all federal, state and local laws.

For Example: The Unidentified Club agrees to abide by the policies of Worcester Polytechnic Institute as well as all federal, state and local laws. Any changes to this constitution and/or bylaws will follow, in word and spirit, all WPI policies and all federal, state and local laws.

Last Updated 1/21/08 CG

## **Campus Center and Student Activities**

100 Institute Rd.

Worcester, MA

508-831-5291

sao@wpi.edu

Date:			

#### WPI CONFERENCE PARTICIPATION CONTRACT

I,	, hereby agree to fulfill all of the terms listed
below	as an official student representative of Worcester Polytechnic Institute at the
	Conference.

- 1. I understand that as a representative of Worcester Polytechnic Institute, I will stay with the delegation at the designated site, and will travel with it via transportation arranged by the organization which should adhere to WPI travel policies.
- 2. I will attend all pre-conference, on-site, and post conference delegation meetings.
- 3. I will attend and participate in all aspects of the conference, including educational sessions.
- 4. I realize that I am a representative of Worcester Polytechnic Institute, and that I have been chosen by my organization to represent it and its interests. As such a representative, I understand that any actions I take at the conference will affect opinions about my organization and Worcester Polytechnic Institute.
- 5. I will engage in behaviors that are responsible and mature. Intoxication, use of illegal substances, and or disruptive, abusive or inappropriate behavior that may result in the breaking of conference, site or University rules may result in my dismissal from the Worcester Polytechnic Institute delegation and conference. If I am asked to leave, I understand that I must reimburse my organization and/or the University for any expenses they cover for my participation in the conference. I will also be required to pay for my own transportation back to Worcester Polytechnic Institute.
- 6. I will participate in any post-conference evaluations.
- 7. I fully understand and agree that my attendance at the conference is as a volunteer and not as an employee of Worcester Polytechnic Institute.
- 8. I fully understand that, as a volunteer, I shall not be eligible or entitled to receive any salary, wage, or other compensation. I understand that I am responsible for any health/medical related costs incurred due to any injury I sustain while participating in my duties as a delegate, and hereby agree to indemnify and hold harmless, the Board of Trustees governing Worcester Polytechnic Institute, their respective officers, employees, servants, and agents, from and against any and all claims or demands in that regard.
- 9. I further represent that I am at least eighteen (18) years of age and voluntarily enter into this waiver with full understanding of any and all risks involved, and further agree that this waiver and release shall be binding upon my heirs, executors, administrators, assignors, and next of kin.

(Continued on other side)

#### **Conference Travel Information**

Student Name:
In case of an emergency, please contact:
Name: Relationship:
Address:
Phone (day): (night):
Medical History (attach additional sheets, where appropriate):  Allergies:
Medications:
Date of last tetanus shot:
Any physical impairment:
Health Insurance Coverage: Company:
Policy Number:
Personal physician:
Physician phone number:
Signature:
Name (printed):
Date:
Student ID Number:
Current Address:
Cell Phone:



#### STUDENT LIABILITY RELEASE FORM

The undersigned *Worcester Polytechnic Institute ("WPI")* Student shall indemnify and hold harmless WPI, it officers, trustees, employees, and agents from and against all claims, damages, losses, and expenses including, but not limited to, medical expenses, attorneys fees, and court awards arising out of or resulting from bodily injury, sickness, disease, death or injury as a result of the activity designated below. Any destruction, damage or disappearance of personal property in the possession of or owned by the Student as a result of participation in the activity designated below is the sole responsibility of the Student.

Signature of this form verifies that the Student has been made aware of and understands the potential, inherent dangers and risks involved in the activity designated below. As such, the Student agrees to abide by the standards of conduct expected while participating in the activity.

Signature of this form also verifies that the Student is covered by appropriate master medical insurance for injuries or illnesses resulting from participation in the designated activity and that the Student has verified that this coverage will extend to the location(s) of this activity and to all endemic diseases. The Student further understands that any deductible, co-payments and uncovered claims will be the sole responsibility of the WPI Student.

Designated Activity – Title or Descrip	tion Location of Activity	Date of Activity
Participant's PRINTED Name	Participant's/Guardian's Signature	Date
Participants Cell Phone		
	MEDICAL RELEASE	
Emergency Contact (or guardian if stu Contact Number:	ident is under 18 years of age):	
Allergies:		
Medications:		Special
consent, on my behalf, to any medical rendered upon the advice of any license	e Worcester Polytechnic Institute and its ag/hospital care treatment (including locations sed physician during the dates of the activity neurred by any hospitalization or treatment	s outside the U.S.) to be y above. I agree to be
	er, have read the above authorization, and cound accurate (*If the participant is not eighteigned by a parent/guardian.)	
Signature:	Date:, 2	.0

## WORCESTER POLYTECHNIC INSTITUTE USE OF FACILITIES

#### WAIVER OF LIABILITY, ASSUMPTION OF RISK, AND INDEMNITY AGREEMENT

Waiver: In consideration of permission to use the facilities, staff, equipment, and services of Worcester Polytechnic Institute's
I have read the previous paragraphs and I know, understand, and appreciate these and other risks that
are inherent in the activities made possible by WPI at the I hereby assert that my participation is voluntary and that I knowingly assume all such risks. I also affirm that I
have adequate medical or health insurance to cover any medical assistance I may require and that I am in
good health and have no physical or other impediment which would endanger me while using the
Indemnification and Hold Harmless: I further agree to indemnify and hold WPI harmless from any and
all claims, actions, suits, procedures, costs, expenses, damages and liabilities, including attorneys' fees
brought as a result of my use of the, and to reimburse them for any such expenses incurred.
<b>Severability and Choice of Law:</b> The undersigned further expressly agrees that the foregoing agreement is intended to be as broad and inclusive as is permitted by Massachusetts law and that if any portion thereof is held invalid, it is agreed that the balance shall, notwithstanding, continue in full legal force and effect. I further agree that this Release shall be governed for all purposes by Massachusetts law, without regard to such law on choice of law.
Acknowledgment and Understanding: I have read this waiver of liability, assumption of risk, and indemnity agreement, fully understand its terms, and understand that I am giving up substantial rights, including my right to sue. I acknowledge that I am signing this agreement freely and voluntarily, and intend my signature to be a complete and unconditional release of all liability.
Signature of User Date Print Name
Parental/Guardian Consent: (To be completed and signed by parent/guardian for User under 18 years of age). I certify that I am the parent or legal guardian of the above User and that I am entitled to his or her custody and control and I do hereby give permission for the Child to use the I hereby execute the above Agreement on his/her behalf.
Signature of Parent/Guardian of Minor Date Print Name User's Age

#### **WPI Collaboration Contract**

Before entering into this contract, both or all parties agree that collaboration is a relationship between two or more organizations to achieve the same goal(s). It is a process that includes many people and requires great communication and cooperation. Any organization designee that signs this contract acknowledges the need to work together and to complete any responsibility or task that is discussed within this contract.

This collaboration contract is between the	(organization) and
(organization). Please list any additional organizations that are part of this collaboration.	oration below:
Event Information Event Title:	
Date of Event:	
Location of Event:	
Time of Event:	
Price of Event:	
Both organizations are responsible for the following and should d necessary. Write down the organization responsible for each task responsible, what their particular responsibilities will include.	
Advertising:	
Programming/Contracting the Event:	
Securing the venue:	
Requesting plant services:	
Requesting Police and Parking:	
Running or Attending the Event:	

(Continued on the next page)

## **WPI Collaboration Contract (continued)** Set Up of the Event: Ordering Food: Break Down of the Event: Payment: Additional Responsibilities/Notes/Expectations: In signing the collaboration contract, \_\_\_\_\_ (organization) and (organization) agrees to follow this contract and assume full responsibility for tasks appointed within this document. Should the guidelines not be met after the signing of this contract, future collaborations will be re-evaluated and this contract will be considered void. Organization: Organization: Organization Designee Signature: Organization Designee Signature: Advisor Signature: Advisor Signature: If there are additional organizations, please provide information and signatures below:

After this document is completely filled out, please make a copy for each organization and bring one copy to the Student Activities Office located on the third floor of the Campus Center to be held in organization documentation.

For more information or assistance, please contact the Office of Student Activities at 1-508-831-5291 or by e-mail at sao@wpi.edu.