



# CLUB HANDBOOK

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A guide to understanding policies  
and identifying resources for clubs



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## Introduction

At Cal Poly, there are three types of student organizations: clubs, club councils, and Independent Student Organizations (ISOs). This Cal Poly Club Handbook provides the key information to help your club or club council succeed. (Please note this handbook uses the term “club” throughout when the content equally applies to clubs or club councils.) A separate handbook covers the policies and procedures for ISOs.

This handbook is designed to assist your club with understanding university policies, identifying resources available through ASI Club Services, and obtaining information that will help make your activities function efficiently. This is not intended to be all-inclusive and much of the information is in excerpt or abbreviated form. For example, there are some policies that have not been addressed in this document that organizations must also follow, such as [Campus Administrative Policies](#).

If you have any questions or would like further information on a specific topic, please contact ASI Club Services or Student Life & Leadership. Both offices are located on the second floor of the University Union.

Contents in this handbook are reviewed and approved by Associated Students, Inc. (ASI) and Student Life & Leadership. Contents of the Cal Poly Club Handbook are subject to change.

## Club Operational Policies

The following university policy excerpts are intended to inform and assist clubs at Cal Poly. If you have questions or require detailed information, please contact ASI Club Services.

### Club Policies

Cal Poly clubs shall:

- Operate within the laws of the State of California and the policies and procedures of the California Polytechnic State University and Associated Students, Inc. (ASI)
- Carry out all activities in accordance with its bylaws.
- Process all amendments to bylaws through ASI Club Services with final approval granted by the university (Student Life & Leadership).
- Keep all funds in an ASI account.
- Annually submit a Charter to ASI Club Services.
- Have a faculty/staff advisor approved by the university via the Charter renewal process.
- Have their president and treasurer (as listed on the charter) maintain a minimum 2.0 grade point average both quarterly and cumulative, be in good standing, and not be on probation of any kind. A grade check will be conducted by Student Life & Leadership for the president and treasurer at the end of each academic quarter.
- Keep a current copy of the bylaws on file with ASI Club Services.

### Equal Access

Cal Poly clubs shall not discriminate either in the content of bylaws or in practice against any person on the basis of race, religion, national origin, ethnicity, color, age, gender, gender identity, marital status, citizenship, sexual orientation, or disability.

The prohibition on membership policies that discriminate on the basis of gender does not apply to social fraternities or sororities, or to other university living groups.

### Hazing

Cal Poly clubs must abide by Section 32050 of the California State Education Code regarding hazing that states:

As used in this article, "hazing" includes any method of initiation or pre-initiation into a club or student body or any pastime or amusement engaged in with respect to such an organization which causes, or is likely to cause, bodily danger, physical harm or personal degradation or disgrace resulting in physical or mental harm, to any pupil or other person attending any school, community college, college, university or other educational institution in this state. The term "hazing" does not include customary athletic events or other similar contests or competitions.

In summary, hazing refers to any activity expected of someone joining a group (or to maintain full status in a group) that humiliates, degrades, or risks emotional and/or physical harm, regardless of the person's willingness to participate.

## Alcohol

As a matter of institutional policy, alcohol is generally prohibited on the Cal Poly campus. Alcohol abuse, including possession of alcohol by a minor, binge drinking, or drunk driving, is not tolerated. View the complete [Cal Poly Alcohol Policy](#) online.

## Student Judicial Process

The judicial process begins when an individual reports a written complaint to Student Life & Leadership or when a Police Summary Report is received by Student Life & Leadership staff concerning an alleged violation of state, city, or campus policies. The complaint will identify a potential violation of university policy by a recognized Cal Poly club. Student Life & Leadership will conduct an investigation of any allegations.

### Judicial Meeting

The judicial process will be administered through Student Life & Leadership. Club representatives will be notified by phone and/or email concerning the nature of the complaint, specifying the alleged violated university policy, and arranging a time and place for the judicial meeting.

The purpose of the judicial meeting is to obtain information concerning the allegation from representatives of the involved club(s). Legal counsel may not represent the club(s). A decision will be rendered as soon as possible and will be communicated, in writing, by a designee of Student Life & Leadership to the club's president, advisor, and/or other appropriate individuals. Student Life & Leadership reserves the right to notify any affiliated national organization of judicial meeting decisions.

### Club Sanctions

Depending on the results of the judicial meeting and the panel recommendations, sanctions may be implemented. Sanctions may include, but are not limited to, written warnings, probation, suspensions, or revocation of the club Charter/recognition, as described below.

**Written Warning:** A letter kept in the club's permanent file.

**Probation:** A letter in the club's permanent file plus a designated time frame during which the club will be closely monitored. Depending on the infraction, probation may also include club members participating in required educational and/or developmental seminars and activities.

**Suspension:** Results in the following:

- A letter kept in the club's permanent file.
- Losing access to university facilities, ASI Club Funding, equipment, and programs for a defined period of time.
- Losing the ability to participate in university events or events utilizing university resources for a defined period of time.

**Revocation of Club Charter/Recognition:** The university no longer recognizes the club and the club loses all university rights and privileges permanently.

## Appeals Process

A club has the right to appeal the decision of Student Life & Leadership. The appeal must be submitted to the Vice President for Student Affairs or a designee. The appeal must be in writing, stating why the club feels the decision rendered is not appropriate. Clubs must submit this appeal within 10 business days after receiving notification of the decision. The Vice President for Student Affairs or a designee will meet with the parties involved and will render a final decision within 10 business days after the meeting. This decision is final and is not subject to further appeal.



## Starting a New Club

The university, through Student Life & Leadership, officially recognizes Cal Poly clubs. ASI is a partner with the university, charged with administering day-to-day club operations. Starting a new club is a process that requires the participation of the new club, ASI Club Services, and Student Life & Leadership, as outlined below.

[Club] Ensure that no other club currently exists with a similar purpose.

[Club] Find a minimum of eight currently enrolled Cal Poly students that are interested in being a part of the club.

[Club] Find a Cal Poly State University employee who would be willing to serve as the club's advisor.

[Club] Complete a Petition for University Recognition form, and bylaws using the Cal Poly Club Bylaw Template.

[Club] Submit the Petition for University Recognition form, bylaws, and an electronic copy of the bylaws (e.g., on CD) (not mandatory) to ASI Club Services for processing.

[ASI Club Services] Verify necessary documents are submitted.

[ASI Club Services] Contact the club to inform them to set up a meeting to discuss the group's purpose with Student Life & Leadership.

[Club] Contact Student Life & Leadership to schedule a meeting.

[Student Life & Leadership] Review bylaws and either approve or deny the process to continue. If denied, Student Life & Leadership will notify the club contact.

[ASI Club Services] Review bylaws for content.

[ASI Club Services] Return bylaws to the club for revisions if necessary, or notify the club that they are now officially recognized by the university and the officers and advisor(s) can begin online training.

[Club] President, treasurer, and advisor must complete the online training.

[Club] Once training is completed, president will receive the Charter via email.

[Club] Complete Charter and submit to ASI Club Services for processing.

## Renewing a Club Charter

The university, through Student Life & Leadership, officially recognizes Cal Poly clubs based on university standards and requirements, which include a current Charter. In order to remain active (e.g., access club funds, receive ASI Club Funding, submit E-Plans), all presidents, treasurers, and advisors must complete online training annually, and every club must renew its charter each year.

**Note:** 2011-2012 Charters will expire on October 5, 2012. All 2012-2013 Charters must be approved on or before this date in order to avoid processing delays. 2012-2013 Charters will expire on June 30, 2013.

### Online Training

The online training can be found on the [Online Training](#) section of the ASI Club Services web site.

- Only the president, treasurer, and advisor are required to complete the online training
  - The training takes approximately 45 minutes to complete.
  - The training does not have to be completed during one session, as long as the officer/advisor resumes the training using the same computer.
  - If multiple officers are completing the training from the same computer, it will resume where the last officer ended.
- Once all required positions have completed the training, ASI Club Services will email the president a Cal Poly Club Charter within five business days of the last person completing their online training.

### Annual Charter Renewal

- The president is responsible for entering all relevant information into the Charter.
- The document must be printed, signed by all officers and advisor(s).
- All college-affiliated clubs, or clubs recognized as being “Academic,” “Honor,” or “Professional,” must have the Dean sign their Charter.
- A Community Service Representative position is listed on the Charter. The responsibility of this position is to organize and manage community service projects for the club. Although this position is not mandatory, Student Life & Leadership recommends that this position be filled, allowing the club to better assist and promote its service projects.
- Once all signatures are obtained, the Charter must be submitted to ASI Club Services for processing.
  - **Note:** Failure to obtain the appropriate signatures will result in the Charter being returned to the club.
- ASI Club Services will verify completeness and forward the Charter to Student Life & Leadership to check president and treasurer GPA and verify that the advisor is a Cal Poly State University employee.
  - **Note:** The president and treasurer listed on the Charter must maintain a minimum 2.0 grade point average both quarterly and cumulative, be in good standing, and not be on

probation of any kind. Student Life & Leadership will conduct a grade check for the president and treasurer once the Charter has been submitted for processing and again at the end of each academic quarter.

- ASI Club Services will notify the president via email when the process is complete.

### **New for the 2012-2013 Academic Year**

#### **Club Bylaws**

- In response to [Executive Order 1068](#) from the CSU Chancellors Office, all Cal Poly clubs will be required to update their bylaws by November 16, 2012 to be in accordance with the open membership/nondiscrimination mandate.
  - Once your club has completed the 2012-13 chartering process, the president and advisor will be emailed a copy of the Cal Poly Club Bylaw Template (which includes the mandated language). It will be your club's responsibility to update your bylaws to be in compliance, and to submit revised club bylaws to ASI Club Services for processing.
  - Bylaws must be submitted and approved by November 16, 2012. Clubs that have not completed the bylaw process by the due date will be placed on temporary inactive status (unable to process club paperwork, receive ASI Club Funding, etc.) until their bylaws have been approved by Student Life & Leadership.

#### **Cal Poly Club Councils**

- For the 2012-2013 academic year, Cal Poly will officially recognize 10 student organizations as Cal Poly Club Councils. These councils are the governing bodies that represent a group of university recognized Cal Poly clubs/Independent Student Organizations.
  - Panhellenic
  - Interfraternity Council (IFC)
  - United Sorority and Fraternity Council (USFC)
  - Sport Club Council
  - College Councils (CAFES, CAED, COSAM, CLA, ENG, OCOB)
- Your club is affiliated with Panhellenic, IFC, USFC, or the Sport Club Council if:
  - Your club has been designated by Student Life & Leadership as being a member organization of the council.
- Your club is affiliated with a college if:
  - Your club is recognized as being "Academic," "Honor," or "Professional".
  - Your club has been designated by Student Life & Leadership as being a member organization of the council.

- If your club is recognized as a member organization to one of the above councils, you will be required to designate a Council Representative on the Charter. In addition, this representative will be responsible for attending council meetings.
- Cal Poly Club Councils (the governing bodies) will be required to submit bylaws utilizing the Cal Poly Club Council Bylaw Template. Bylaws must be submitted and approved by November 16, 2012 (Cal Poly Club Councils affiliated with a college are due June 30, 2012). Clubs that have not completed the bylaw process by the due date will be placed on temporary inactive status (unable to process club paperwork, receive ASI Club Funding, etc.) until their bylaws have been approved by Student Life & Leadership.

### **Adding Additional Officer(s)/Advisor(s) to an Existing Charter**

When a club wishes to add additional officer(s)/advisor(s) to a Charter without removing any current officer(s)/advisor(s), the club can begin the “Add to Charter” process as outlined below.

The club must notify ASI Club Services so that an Add to Charter form can be sent to the president. Upon receiving the Add to Charter form, the president will need to sign the Charter and also obtain the signature(s) of the new officer(s)/advisor(s) being added. The only signatures needed are those of the new officer(s)/advisor(s) and the president (the current advisor’s signature is not required). Submit completed Add to Charter form to ASI Club Services for processing. Once the chartering process is completed, the president will be notified by ASI Club Services by email.

**Note:** New officer(s)/advisor(s) will not be able to sign any paperwork until the Charter has been approved by Student Life & Leadership.

**Note:** A club has the ability to add as many officers to their Charter as desired. While the Charter states specific officer titles (e.g., President, Vice President, Secretary), this does not mean that those are the only officer positions a club can have on file. To add another officer position with a different title, cross out the officer titles that do not apply and write in the desired officer titles.

### **Replacing Officer(s)/Advisor(s) on an Existing Charter**

When a club wishes to replace officer(s)/advisor(s) on a Charter, the club can begin the Replace Charter process. This should be done every time a change needs to occur using one of the two options outlined below.

#### **Option One: New President, Treasurer, and Advisor Complete Online Training**

The new president, treasurer, and advisor complete the online training on the ASI Club Services web site (i.e., as described in the Online Training section earlier in this chapter). Once all training requirements are complete, a Replace Charter form will be emailed to the president. Upon receiving the Charter, the president will need to obtain all signatures, including that of the College Dean if the club is affiliated with their college. Submit completed Replace Charter form to ASI Club Services for processing. Once the chartering process is completed, the president will be notified by ASI Club Services by email.

This option must be followed when replacing all three training-required positions (i.e., president, treasurer, and advisor). However, this option can be used even in the case of replacing a single position.

**Note:** New officer(s)/advisor(s) will not be able to sign any paperwork until the Charter has been approved by Student Life & Leadership.

#### **Option Two: New President, Treasurer, or Advisor Notifies ASI Club Services**

This option is used to replace a single position that is required to complete the online training (i.e., president, treasurer, or advisor) without forcing the others to unnecessarily redo their training. First, the new officer or advisor must complete the online training on the ASI Club Services web site (i.e., as described in the Online Training section earlier in this chapter). Once the training is complete, the club must contact ASI Club Services to request a Replace Charter form and provide the name(s) and position(s) of the new officer(s)/advisor(s). Once ASI Club Services is notified, a Replace Charter form will be emailed to the president. Upon receiving the Charter, the president will need to obtain the signatures of the new officer(s)/advisor(s) and then submit the completed Replace Charter form to ASI Club Services for processing. Once the chartering process is completed, the president will be notified by ASI Club Services by email.

**Note:** New officer(s)/advisor(s) will not be able to sign any paperwork until the Charter has been approved by Student Life & Leadership. No requests (e.g., Club Payment Request Forms (PRFs), ASI Club Funding, E-Plans) can be processed until the Charter has been approved. Officers on the previous Charter may sign paperwork until either the previous Charter expires (e.g., October 5, 2012 for the 2011-2012 academic year) or until the new Charter is approved.

#### **Removing Officer(s)/Advisor(s) from an Existing Charter**

When a club wishes to remove, and not replace, officer(s)/advisor(s) from a Charter, the club can begin the Replace Charter process as outlined above.

**Note:** As all clubs must have a president, treasurer, and advisor. The Replace Charter process can not be used to remove those positions. Clubs must maintain a minimum of three officers on the Charter at all times.

## General Club Information

### Updating Bylaws

When a club wishes to update their bylaws, new bylaws must be submitted using the Cal Poly Club Bylaw Template found on the [Forms](#) section of the ASI Club Services web site. A copy of the club's current bylaws is available with ASI Club Services, should the club need them as a reference.

To update bylaws, the following must be submitted to ASI Club Services:

- A typed copy of the club's new bylaws.
- An electronic copy of the bylaws in Microsoft Word on CD (not required but if submitted, this CD will be kept on file for future reference).
- A completed Cal Poly Club Bylaw Amendment Request form. This form can be found on the [Forms](#) section of the ASI Club Services web site.

Once these items have been submitted, the changes will be reviewed. If approved, the club will be notified and the necessary changes will be made to the club's file.

### Changing a Club's Name

When changing a club's name, new bylaws reflecting the name change must be submitted using the Cal Poly Club Bylaw Template found on the [Forms](#) section of the ASI Club Services web site. A copy of the club's current bylaws is available with ASI Club Services, should the club need them as a reference.

To request a club name change, the following must be submitted to ASI Club Services:

- A typed copy of the club's new bylaws (updated with the club's new name).
- An electronic copy of the bylaws in Microsoft Word on CD (not required but if submitted, this CD will be kept on file for future reference).
- A completed Cal Poly Club Name Change Request form. This form can be found on the [Forms](#) section of the ASI Club Services web site.

Once these items have been submitted, the changes will be reviewed. If approved, the club will be notified and the necessary changes will be made to the club's file.

**Note:** Once the club name change is approved, the club will be required to submit a new Charter that reflects the new club name.

### Inactive Clubs

After two years of inactivity, defined by a club not renewing their Charter, a club's funds will become property of ASI. If the club reactivates, they can petition the ASI Board of Directors for the return of the funds.

### Online Club Directory

The Club Directory is an online database of all recognized Cal Poly clubs. This directory includes information gathered from each group's current Charter, including contact information for the president and advisor, links to club web pages, and a brief description of the club.

## **UNIX & Email Account**

Upon request, clubs are given one central UNIX account for a web page, one email account, and one entry in the campus directory server that redirects your messages to the email account. To set up these services, print the Request for a Cal Poly Email/Webpage form found on the [Forms](#) section of the ASI Club Services web site. Once the form is filled out and the proper signatures are obtained, submit it to ASI Club Services. This information will be forwarded to Cal Poly Information Technology Services, who will then contact the club representative with further information.

Use of the university's information technology resources is strictly prohibited for unauthorized commercial activities, personal gain, and private, or otherwise unrelated to the university, business or fundraising. This includes soliciting, promoting, selling, marketing or advertising products or services, or reselling university resources.

### **Prohibited Commercial Use:**

- Displaying personal items for sale on a web page residing on or transmitted through university resources.
- Displaying commercial advertisements on a web page hosted on university resources.
- Using a Cal Poly account to create and host a web site for a local organization promoting fundraisers and other commercial activities.
- Using a Cal Poly account to operate or conduct non-university-related business activities, including financial management, advertising and promotion, correspondence, web sites, etc.

Campus auxiliary organizations are authorized to provide services and products to students, faculty and staff, and invited guests of the university through operating and service support leases. The University President or designee may authorize additional limited commercial uses under separate policy provisions. Such users are exempt from the above prohibitions. These prohibitions are not intended to infringe on authorized uses that enable students, staff, and faculty to carry out their duties and assignments in support of the university mission.

## **Mail Services**

The use of campus mail delivery services is limited to official university mail and interdepartmental correspondence and may not be used by clubs for mass mailings to faculty and staff. Under no circumstance are clubs to use the ASI or university Bulk Mail Permits for either on or off-campus mailings.

### **Club Mailboxes**

Every club has a mailbox located in the Epicenter that can be used for receiving mail sent from both on and off-campus. Mail may be picked up during ASI Club Services business hours. Club mailing addresses must include the following information:

Club Name, Mailbox #

ASI - Epicenter

1 Grand Avenue

San Luis Obispo, CA93407-0675

If a club receives a package that does not fit in the club's mailbox, ASI Club Services will notify the president and advisor by email. If the package is not picked up within two weeks, it will be forwarded to the advisors on campus office. All mailboxes will be cleaned out at the end of the academic year. All mass mailings will be discarded, and any club mail will be forwarded to the advisor.

### **Use of Cal Poly Name and Symbol**

Cal Poly requires any merchandise displaying the marks (i.e., name, symbol, or logo) of the university to be purchased from a licensed vendor. The following are examples of Cal Poly marks that require approval:

- Cal Poly
- California Polytechnic State University
- Cal Poly web site (i.e. clubname.calpoly.edu)
- Cal Poly email (i.e. clubname@calpoly.edu)
- Cal Poly abbreviations (e.g., CP, Poly)
- Mustangs
- Musty the Mustang Logo

The Club PRF includes an additional question regarding to the use of Cal Poly marks. If the purchases being paid/reimbursed for on the Club PRF include the use of any Cal Poly marks, it must be indicated on the Club PRF and a Request to Use the Cal Poly Marks form, which can be found on the [Forms](#) section of the ASI Club Services web site must be completed and submitted to the Cal Poly Licensing and Trademark office for approval.

**Note:** Failure to use a properly-licensed vendor may lead to suspended club privileges and not receiving reimbursement for unapproved purchases.



## **Club Responsibilities to Their Advisor(s)**

It is each club's responsibility to utilize their advisor(s) and maintain open communication. These responsibilities provide a foundation for a club to work effectively with their advisor(s).

### **Club Responsibilities**

- When planning club meetings for the year, the group should make an effort to designate times that are convenient for their advisor(s) to attend the meetings.
- Minutes of meetings, as well as other club materials, should be distributed to their advisor(s). This keeps the advisor(s) informed and allows them to keep historical files of useful information.
- If executive meetings are established to determine agendas or to discuss club issues, their advisor(s) should be invited. If the advisor(s) are unable to attend, they should be informed about what was discussed at the meeting.
- The officers of the club should maintain a close relationship with their advisor(s) and should provide opportunities for them to meet as many club members as possible.
- Clubs should invite their advisor(s) to all events. It is important to not only inform their advisor(s) about what is happening, but also allow them to provide input about the proposed event or activity.
- If situations arise that may cause problems for the club or its members, the advisor(s) should be informed immediately.
- Clubs should regularly update their advisor(s) concerning the financial status of the organization.
- A club should be aware that their advisor(s) are providing services without compensation. Although advisors do not expect special recognition, they like to know their time is appreciated.

## Advisor Responsibilities to Their Club

All clubs chartering for the academic year must have an advisor that is a university (i.e., Cal Poly State University employee). The advisor's employment with the state will be verified by Student Life & Leadership as part of the chartering process. All advisors should understand that by agreeing to serve as an advisor, they are assuming certain responsibilities. An effective advisor has a strong belief in the club, a desire to help students succeed, a willingness to share expertise, and a commitment to spend time with the club's officers and members.

### Advisor Responsibilities

- Be a university representative to the club.
  - Learn about pertinent university policies and procedures. Advise club officers on adhering to these policies, including those regarding alcohol, contracts, and purchasing.
- Provide continuity from year-to-year during transitional periods.
- Help mediate within the club and assist with problems that may arise.
- Act as a role model. Encourage leadership and group development.
- Assist in developing the club's short and long-term goals and provide guidance to help the club reach those goals.
- Be aware of all club activities, be involved with all club events, and provide insight and guidance for activity planning.
  - Review and authorize E-Plans. Failure to approve E-Plans within the proper timelines will result in the denial of the request. Review published materials and advertising before they are distributed.
- Review expenditures, support budget planning, and monitor financial records.
  - Carefully review and authorize all Club PRFs and accompanying original/itemized receipts and invoices. Club PRFs must have the advisor's signature in order to be processed. If an advisor's signature on a Club PRF appears different than the signature on the club's Charter, payment processing will be delayed until the signature can be verified.
  - Remind club officers to request Purchase Orders prior to confirming orders with vendors whenever possible.
- Review contracts.
  - Review contracts to ensure that all information is correct. However, advisors can not sign contracts or service agreements on behalf of the club (e.g. with restaurants, service vendors). All contracts must be submitted to ASI Club Services for processing.
- Review all distributed material, publicity, and official correspondence before distribution.
- Review and approve Cash Securities forms, Gift-in-Kind forms, ASI Club Funding applications, and PayPal Button Request forms. Other documents do not require the advisor's approval/signature, but should still be reviewed.

- Report disclosed information (i.e., Clery Act).
  - The Clery Act is a federal law that mandates crime statistic disclosure, publication of campus security policies, and the posting of a crime log for the university. The Annual Security Report provides alcohol/other drug resources, offers information about sexual assault, and addresses other safety issues affecting our community. The Clery Act also contains a timely warning policy mechanism to ensure that students, staff, and faculty know about serious, on-going threats to safety on campus.
  - Advisors have a mandated reporting responsibility. If a student reports or discloses a crime to their advisor, the advisor is expected to file a confidential report with the University Police Department that contains demographic information about the crime. The student's name and personally identifiable information are not a part of the report. The following are examples of crimes that must be reported:
    - A student talks to his advisor in confidence about his roommate who recently stole his bicycle.
    - A student talks to her advisor in confidence about a party she attended where she was drugged and sexually assaulted.
    - A student talks to her advisor in confidence about her house being broken in to and her laptop being stolen
  - If the advisor becomes aware of a missing or potentially missing person, the advisor must report the incident to the University Police Department without delay. The on-duty Police Dispatcher can be contacted at (805) 756-2281. In the case of an emergency, dial 911. Students can also make anonymous reports of crimes by text or email to [calpoly@tipnow.org](mailto:calpoly@tipnow.org). For questions regarding the Clery Act or the reporting of crimes at Cal Poly, please contact Police Records Manager Fred Mills at [fmills@calpoly.edu](mailto:fmills@calpoly.edu) or (805) 756- 6685.
- Receive all club mail at the end of the academic year that has not been picked up by club officers.

### **Co-Advisors**

Although not required, all clubs are encouraged to designate a co-advisor on their Charter who will have signing authority if the primary advisor is unavailable. Co-advisors must also be Cal Poly State University employees. Failure to obtain a co-advisor could result in processing delays if the primary advisor is unavailable for signature.

### **Words of Wisdom for Club Advisors**

- An effective advisor allows students to make decisions and learn from their experiences. While it may be an advisor's first reaction to intervene and fix mistakes, this is not necessarily the role of an advisor.
- An advisor should help the club members benefit from their experiences by using mistakes as teachable moments. Conversely, while it may be easy to sit back and say, "Everything is a learning experience, I won't interfere with what they say or do," it is the advisor's responsibility

to ensure that students understand the consequences that could result from their decisions. In other words, the advisor should be proactive when a potentially controversial or policy-related situation or decision is discussed.

- Part of the educational experience students gain in a club leadership position is how to manage a budget and maintain fiscal records. The advisor's primary role regarding finances will be to monitor expenses, provide feedback on the budget, and authorize Club PRFs. The advisor's signature (in addition to a student officer's signature) signifies that club money is being spent appropriately. The advisor provides an extra security level to protect the integrity of club funds.

## Financial Processes

### Club Accounts

All recognized Cal Poly clubs, with the exception of Independent Student Organizations (ISOs), have a financial account with ASI. ASI works with Chase bank to maintain Cal Poly club accounts. University policy requires that recognized clubs deposit all funds with ASI. The purpose of this policy is to ensure the integrity of the funds from year to year. Financial statements, donations, and all check and purchase order requests are processed by ASI Club Services.

Clubs are not permitted to have off-campus bank accounts. Clubs found to have off-campus bank accounts are subject to disciplinary action. Requests for checks or transfers to any club account held off-campus will not be processed.

### Depositing Funds into a Club Account

To deposit non-donation money into a club's account, an officer of the club that is listed on the current Charter must go directly to the Chase bank branch located on the first floor of the University Union. General club members can not deposit on behalf of their club. Club deposits are accepted at Chase Monday - Friday, 9 a.m. - 6 p.m. and Saturday, 9 a.m. - 2p.m., unless otherwise posted. The Cal Poly Chase bank branch is the only Chase bank branch that accepts club deposits.

Refer to the "Gift and Donation Processing" for appropriate donation processing procedures.

### Separation of Duties

No single person should have complete control over the entire process of receiving funds, preparing the bank deposit, and verifying the deposit. Separation of duties must be maintained when cash is received and processed. Separation of Duties requires that two or more qualified and authorized persons are involved in the process of collecting, handling, depositing, and accounting for all cash/check transactions. The person collecting money, issuing receipts, and preparing the deposit should be someone other than the person verifying the deposit.

### Preparing Deposits

- Accountability for and documentation of cash and checks must be maintained when preparing club deposits. The validation and preparation of deposits should be done in a non-public, safe, and secure location. A report of cash collections signed by the preparer should be kept for your club's records.
- Deposits should be made the same day as collected if possible or as soon as possible if not (i.e., the next business day).
- Deposit slips can be found outside of the Epicenter, at the ASI Club Services Self-Service Station, or at the Cal Poly branch of Chase bank and should be completed prior to approaching a bank teller. Amounts should be filled in by denomination on the left, and the club's name and account number filled out on the right.
- Write a general description of the funds being deposited (e.g., "dues, t-shirt sales, fundraising"). The description (up to 20 characters) will appear on a transaction report that officers can request from ASI Club Services.

- For cash, place like bills together (i.e., all \$1 bills together, all \$5 bills together, etc.) and roll coins in coin wrappers if appropriate.
- For checks, make copies of all checks for your clubs record. Sort checks by dollar amount. Stamp all checks prior to making a deposit. ASI Club Services and Chase bank have an endorsement stamp available for club use.
- Depositors are required to stay with the teller during the entire deposit process. After making a deposit, your club should retain the yellow copy of the deposit slip.

### Physical Security

All cash and checks should be physically protected from loss at all times, locked in a secure receptacle. If your club will be depositing large sums of money (e.g., over \$2,000), it is highly recommended that two club officers accompany the deposit for security reasons. University Police are available to escort an officer making a deposit as well.

### Depositing Checks

All checks for deposit must have:

- The club as the payee and have not been altered.
- A date within the last six months.
- A legible and consistent amount, both numeric and written.
- A proper account holder signature (authorized signer).
- Printed (not handwritten) name, address and check numbers.
- Two or less corrections, initialed by the signer.

### Returned Checks

If a deposited check is returned from the bank due to insufficient funds (i.e., “bounced”), stop payment, stale check, or any other reason, the ASI Business Office sends a collection letter to the individual who wrote the returned check. The letter states that the amount of the check plus a collection fee of \$5 plus current bank fees for returned items must be paid in the form of cash, money order, or cashier’s check. If the check writer approaches an officer to make payment, the individual should be directed by the officer to the ASI Business Office to make the payment. ASI Club Services will not be able to track payments or record the transaction accurately if done otherwise.

Although the club is initially responsible for all fees and penalties assessed as a result of the returned check, the fees will be reimbursed once collection has occurred. Chase bank currently charges \$25.00 per returned check and the original check amount is reversed from the deposit. Returned check fees may change without notice. ASI charges an additional \$5.00 for collection activities. The amount of the check and associated fees will be deducted from the club’s account. The funds will be credited back to the club account only when/if payment (including bank and collection fees) is received on the returned check.

## Availability of Funds

There is a five-to-seven business day delay between the deposit of funds at Chase bank and the posting of the deposit to the club account. If immediate access to deposited funds is needed, speak to ASI Club Services for available options.

## Credit Card Transactions (Non-Donation Related)

Deposits can not be made by providing credit card information to ASI Club Services or Chase bank for processing.

Clubs interested in accepting credit card payments will be required to utilize PayPal. To receive a PayPal button next to your club name on the online Club Directory, please complete the PayPal Button Request form found on the [Forms](#) section of the ASI Club Services web site. All requests to receive a PayPal button must be submitted 14 days in advance to allow for processing.

## Obtaining Funds from an state department or entity

ASI will provide invoicing services to clubs in order to obtain funds from an on-campus state department or entity. The university requires clubs to submit supporting paperwork documenting actual expenses for events, with an ASI invoice.

To request an invoice, submit back-up documentation to ASI Club Services (e.g., email authorization, Purchase Order received by your club, event registration forms). As soon as the ASI invoice is created (approximately 7 business days), the reimbursement amount will appear on your club's transaction report. However, this does not mean that the invoice has been paid. To confirm that the invoice has been paid, contact ASI Club Services.

**Note:** Product sales and services can not be invoiced due to labor laws and sales tax regulations.

## Withdrawing Funds from a Club Account - Club Payment Request Form (PRF)

Clubs may use club funds to pay invoices and reimburse club members by filling out a Club PRF. A Club PRF is a form to request that funds be paid to a person, business, or other club (in the form of a check or transfer) or reserved in the club's account (through a Purchase Order) to ensure payment to a vendor or service provider at a later date. This form requires both an advisor and officer signature, which is verified from the current Charter. The officer signature must be different than the payee. If the Club PRF is submitted with all required information, signatures, and supporting documentation, the payment will be available for pick-up within five to seven business days. Payments can be picked up during ASI Club Services business hours.



# CLUB PAYMENT REQUEST FORM

Date Generated: 4/10/2012

Issue CHECK       Issue PURCHASE ORDER       Transfer (Between clubs only)  
(Break out shipping and sales tax in the description area)

CHOOSE ONE:  
 MAIL  With Attached       FAX Purchase Order to: \_\_\_\_\_  
 CAMPUS MAIL  With Attached       With Attached  
 HOLD WITH CLUB SERVICES      Attn: \_\_\_\_\_

Payee Name: \_\_\_\_\_ John Doe      Payee CP Email: \_\_\_\_\_ @calpoly.edu  
 Payee Street Address: \_\_\_\_\_ 411 Information Drive      Payee Phone #: \_\_\_\_\_  
 City: \_\_\_\_\_ San Luis Obispo      State: CA      Zip Code: \_\_\_\_\_ 93401  
 For services or scholarships, attach W-9 & copy of contract for new vendor:      Amount \$: \_\_\_\_\_ \$242.84  
 IRS Form W-9 Attached       Copy of Contract Attached      Invoice #: \_\_\_\_\_

CLUB NAME: \_\_\_\_\_ Let's Have Fun Club      ACCOUNT NUMBER: \_\_\_\_\_ 12345

YES  NO My club has been approved for ASI Club Sponsorship for the current fiscal year.  
 YES  NO Use Club Sponsorship to pay for the following expenses. See Club Sponsorship Procedures for qualifying expenses.  
 YES  NO The Cal Poly name, logos, marks, and/or symbols were used on the items listed below.

QTY	DESCRIPTION <small>(Break out shipping and sales tax for all Purchase Orders)</small>	UNIT PRICE	ITEM TOTAL	ACCOUNTING USE ONLY
1	Vans	\$ 25.83	\$ 25.83	
1	Coelco	\$ 88.45	\$ 88.45	
1	Ralphs	\$ 128.56	\$ 128.56	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			<b>TOTAL</b>	<b>\$242.84</b>

**IMPORTANT REMINDERS:**  
**Signatures:** All PRFs must be signed by an officer and advisor that is listed on the current Charter on file with ASI Club Services. In addition, the officer signature must be different than the payee. Any signatures that cannot be verified with the Charter will be returned to the club, resulting in processing delays.  
**Back-up Documentation:** Original, itemized receipts/invoices are required for all reimbursements/payments; copies will not be accepted, no exceptions. ASI Club Services cannot, under any circumstances, reimburse for lost receipts/invoices. Explanation of all short pays and unreimbursable items must be included. If you are paying a vendor, please indicate if the product/service has been received. Please see the Club Handbook for a more inclusive overview of proper PRF back-up.  
**Payment for Services:** PRFS for service providers must be accompanied by a completed W-9 tax form. Contact ASI Club Services to determine if a W-9 is needed.  
**Sales and Use Tax:** All tax requirements will be applied as appropriate. If this is a P.O., please be sure to break out shipping and sales tax in the description area.

Officer Signature: \_\_\_\_\_ *Sandra Jones*      Print Name: Sandra Jones      Phone: 805-777-5882      Date: 4/10/2012

**\*\*I verify that club funds will not be used to purchase alcohol or to reimburse for alcohol expenses\*\***

Advisor Signature: \_\_\_\_\_ *Timothy Smith*      Print Name: Timothy Smith      Phone: 805-756-6086      Date: 4/12/2012

**FOR OFFICE USE ONLY:**  
 Club Balance: \_\_\_\_\_ CF:  Yes  No      CF Balance: \_\_\_\_\_ CF#: \_\_\_\_\_  
 CSA Signature: \_\_\_\_\_ Date: \_\_\_\_\_ SLB Director: \_\_\_\_\_ Date: \_\_\_\_\_



## Club Payment Request Form Guidelines

- The purchase of prepaid credit cards or gift cards for vendors who sell alcohol (e.g., grocery stores, restaurants) can not be reimbursed. Since items bought with a prepaid credit card or gift card can not be tracked, there is no way to ensure alcohol was not purchased.
- Payment Request Forms can not be used to request petty cash. Petty cash is not available to clubs.
- Club members can not sign Club PRFs to reimburse themselves. Another officer with financial authorization must sign the Club PRF for checks and balances purposes.
- “White out” correction fluid (e.g., Wite-Out, Liquid Paper) may not be used on Club PRFs since ASI Club Services can not verify when it was used (i.e., before or after signatures). Club PRFs submitted with “white out” will returned to the club to be redone. If changes are necessary, follow these steps:
  - Draw a single line through the incorrect information and have the club officer initial next to it.
  - Write the correct information on the form.
  - The correct information must be initialed by the advisor prior to submitting to ASI Club Services.
- The Club PRF includes additional questions pertaining to the use of ASI Club Sponsorship Funds and the use of Cal Poly’s marks. On the Club PRF, there are three checkboxes underneath your club name that state:
  - “My club has been approved for ASI Club Sponsorship for the current fiscal year.”
  - “Use Club Sponsorship to pay for the following expenses (See ASI Club Funding procedures for qualifying expenses).”
  - “The Cal Poly name, logos, marks, and/or symbols were used on the items listed below.”
- Selecting “yes” or “no” in these checkboxes will determine how ASI Club Services processes the Club PRF.
  - For clubs that have received ASI Club Sponsorship (\$350), you would select “yes” next to the first statement. This checkbox is meant to help you think about whether or not your club has applied for and been allocated ASI Club Funding for the current fiscal year.
  - The next checkbox is crucial in actually utilizing your ASI Club Sponsorship funds. Select “yes” if you want the specific expenses associated with that particular Club PRF to be paid from the \$350 of ASI Club Sponsorship funding. If you select “no” or leave this checkbox empty, even if the club has been granted ASI Club Funding and has some or all of the \$350 left to spend, none of the qualifying expenses associated with that Club PRF are going to be paid from your ASI Club Sponsorship funds.

**Note:** Once a Club PRF has been processed, ASI Club Services will not go back and apply ASI Club Sponsorship funds to those expenses (i.e., change a “no” to a “yes”).

- The third and final checkbox informs ASI Club Services whether or not any merchandise being reimbursed or paid for uses the Cal Poly name, logos, marks, and/or symbols. If you select “yes,” the appropriately signed copy of the Request to Use the Cal Poly Name/Marks form must be attached to the Club PRF in order to be processed. If you select “no,” this indicates that the club has not used the Cal Poly name, logos, marks, and/or symbols on the items being paid/reimbursed for. If this checkbox is left blank and the back-up documentation shows that merchandise of one kind or another has been purchased, the Club PRF will not be processed and will be returned to the club’s mailbox.

**Note:** Failure to use a properly-licensed vendor or failure to get approval when purchasing merchandise using Cal Poly marks may lead to suspended club privileges, the vendor not being paid, and/or not receiving reimbursement.

### **New for 2012-13**

- Effective July 1, 2012 clubs will be required to include the payee’s Cal Poly email address (if applicable) on all Club PRFs. If an email address is not provided, and can not be confirmed by ASI Club Services, the Club PRF will be returned to the club’s mailbox.
  - If the payee is not affiliated with the university, clubs must write “n/a” in the space provided for the Cal Poly email address.

**Note:** Every year, the Club PRF is updated. The most current form can be found on the [Forms](#) section of the ASI Club Services web site. Failure to use the most recent form could result in the Club PRF being returned.

### **Club Payment Request Form Back-up Documentation**

Every Club PRF submitted to ASI Club Services must have proper supporting documentation. Back-up documentation is required for auditing purposes and serves to protect the club’s funds. The most common form of documentation is an original itemized sales receipt from a vendor. All club members should save original receipts from transactions. Submission of a Club PRF without complete back-up documentation will result in a delay of payment.

Any receipts submitted without proof of payment will not be reimbursed.

Lost receipts for cash purchases will not be reimbursed, even with an advisor memo.

**Note:** Do not highlight receipts as this may make the ink on the receipt disappear.

### **Club Payment Request Form for Reimbursement**

When reimbursing someone for a club related purchase, at least one of the following must be submitted with your Club PRF:

- Original itemized receipt/invoice listing the item(s) purchased.
- Original handwritten receipt/invoice with the company name and contact information printed on the receipt.

- In the case of online orders, a printed copy of the order acknowledgement (i.e., should be the final receipt) showing the payee name, item(s), and cost.

In all cases, the documentation must state that payment was made in cash, check, or credit card.

**Note:** Lost receipts for cash purchases will not be reimbursed, even with an advisor memo.

### Club Payment Request Form for Invoices

When paying a company directly based on an invoice, the following documentation must be submitted with your Club PRF:

- Original invoice from company detailing:
  - Company name and contact information
  - Invoice date
  - Item(s) and/or service(s) purchased
  - Amount owed
- IRS Form W-9 (A vendor's W-9 must be on file with ASI Club Services in order to issue payment. Contact ASI Club Services to see if a W-9 is needed from your vendor or if one is already on file.)

**Note:** Supporting documentation must state that it is an invoice (i.e., it can not state that it is an estimate, quote, statement, etc.). If the documentation states that it is an estimate or quote, ASI Club Services will only issue a Purchase Order.

### Invoices from On-Campus Vendors

Once ASI Club Services receives an invoice from the campus vendor/service provider, we will email the club informing them of the amount of the charge. If the club does not contact ASI Club Services to dispute the amount within five business days, the amount will be removed from their club account.

### Invoices from Off-Campus Vendors

If ASI Club Services receives an invoice in the mail from an off-campus vendor and the club does not have a Purchase Order on file, the invoice will be placed in the club's mailbox. The club must then complete a Club PRF and provide appropriate supporting documentation to pay the vendor (see the "Club PRFs for Invoices" section above).

### Club Payment Request Form for Contracts

When paying based on a contract, the following documentation must be submitted with your Club PRF:

- An approved contract signed by the appropriate campus entity detailing:
  - Payee contact information
  - Item(s) and/or service(s) being purchased
  - Payment terms as specified in the contract
  - Amount due as specified in the contract

- IRS Form W-9 (A vendor's W-9 must be on file with ASI Club Services in order to issue payment. Contact ASI Club Services to see if a W-9 is needed from your vendor or if one is already on file.)

### Club Payment Request Form for Scholarships

When paying a Cal Poly student a scholarship, the Club PRF must be completed to include:

- Make the Club PRF payable to CPSU Financial Aid.
- The student's Employee ID#.
- The student's Cal Poly email address
- Address the Club PRF to (Payee Street Address) Administration Bldg. 131 E.

Back-up documentation for a scholarship must include:

- Club name that is providing the scholarship
- Recipient's name
- Recipient's Employee ID#
- Scholarship amount
- A memo from the club advisor stating the reason for the scholarship and how the recipient was selected as well as supporting documentation.

**Note:** Whatever is stated on the advisor memo must also have appropriate supporting documentation (e.g., if the scholarship is for an essay contest, the club must provide a copy of the contest rules and the winning essay).

Submit the completed Club PRF to ASI Club Services. ASI Club Services will check the Club PRF for completeness and correct signatures. If complete, the Club PRF will be processed and a check will be sent to the Cal Poly Financial Aid Office. Financial Aid will either directly deposit the scholarship into the recipient's account or a check will be mailed to the current mailing address on the recipient's Cal Poly Portal. It takes approximately two to four week to process and distribute a scholarship.

**Note:** When paying a non-Cal Poly student a scholarship, please see ASI Club services as this process is different.

### Payment Request Forms for Awards

If your club will be distributing money as an award (e.g., cash prize), follow these directions:

- Complete the Club PRF, making it payable to (Payee Name) the recipient receiving the award.
- Submit the following back-up documentation:
  - A completed IRS Form W-9
  - A memo from the club advisor explaining the award
  - Supporting documentation for the memo (i.e., anything listed in the memo must have supporting documentation)

**Note:** If an individual is awarded over \$600.00 in a fiscal year, it is considered taxable income and must be reported to the IRS.

### Club Payment Request Form for Purchase Orders

A Purchase Order is an official, legal document that authorizes a vendor to deliver an ordered product or service and obligates payment once the product or service is received and invoiced. When a club submits a Purchase Order, this encumbers (or sets aside) the amount requested in the club's account until the final invoice and payment authorization is received.

By having a Purchase Order on file it will ensure your club has sufficient funds in your club account to cover the expenses being requested. Most campus entities will require a Purchase Order from a club prior to providing any goods or services (unless the club has decided to pay out of pocket and be reimbursed after).

To request a Purchase Order check the "Issue Purchase Order" box at the top of the Club PRF. Fill out the name, address, phone number and fax number of the vendor along with the necessary club information. Required back-up documentation for a Purchase Order includes an IRS Form W-9 for the vendor, and a detailed estimate or quote of the purchase, including the anticipated total with expected shipping charges.

**Note:** ASI Club Services has frequently used vendor IRS Form W-9 on file. However, if we do not have it, it is the club's responsibility to obtain one from the vendor.

Purchase Orders are processed within five to seven business days and will be faxed to the vendor. A copy of the Purchase Order will be placed in the club's mailbox.

Upon receiving the final invoice from the vendor, ASI Club Services will contact the club to ensure that the items or services were received and that the amount (if over the original Purchase Order amount) is approved to pay. If the vendor sends the club the final invoice, it must be submitted to ASI Club Services in order for the vendor to receive final payment.

### Club Payment Request Form for Transfers

Funds can be transferred from one Cal Poly club's account to another by completing a Club PRF. Under "Payee Name," put the club's name and account number to which funds are being transferred. In this situation, it is not necessary to fill out the "Payee Street Address" section. Insert the paying club's information under "Club Name" and "Account Number." Under "Description," write "Transfer" and include an explanation of why the transfer is necessary.

Back-up documentation for a transfer must include:

- A signed memo from the advisor detailing:
  - Reason for the transfer
  - Amount to be transferred
  - Any other information that will help to support the reason for the transfer (e.g., club transaction report, fliers, receipts)

**Note:** A transfer can only be done between clubs. Whatever is stated in the advisor memo must be proved with additional supporting documentation.

## Charging Privileges

### On-Campus Vendors

While most on-campus vendors accept and recommend a Purchase Order, there are some vendors that will automatically charge your club account, even if a Purchase Order was never initiated by the club. In this case, the president and advisor will receive a notification email from ASI Club Services with the charge amount and a brief description of the charge.

It is the club's responsibility to respond to ASI Club Services if you do not approve payment. If a response is not received within five business days of notification, the bill will automatically be paid and the funds will be removed from your club's account. The following on-campus vendors have the authority to do a chargeback after the product or service has been received:

- CPSU Facility Services (i.e. trash cans, recycle cans, tables, chairs, etc.)
- All State Accounts (i.e. Department accounts, UPD, parking, insurance, copier charges, etc.)

**Note:** At times the charge description that ASI Club Services is provided is vague. It is in the best interest of your club to keep records of any expenses you are incurring with on-campus vendors.

### ASI

If your club is reserving space or renting equipment from ASI, you will be made aware of the estimated expenses of your request (AV, set-up, equipment rental, etc.). Prior to the event you will provide the ASI department you are working with your club account number.

After the event, ASI Club Services will send a notification email to the president and advisor with the charge amount and a description of the charge. It is your responsibility to respond to ASI Club Services if you do not approve payment of these charges. If a response is not received within five business days of notification, the bill will automatically be paid and the funds will be removed from your club's account. The following ASI departments will charge back after the product or service has been received.

- ASI Audio Visual
- ASI Event Operations
- ASI Recreational Sports/Sports Complex
- Poly Escapes

### Sales Tax

Cal Poly clubs must abide by sales tax reporting laws. California has a "sales and use tax," which means that for all purchases, except for services, sales tax must be paid. If the vendor does not collect California sales tax from the purchaser, such as the case with out-of-state orders, ASI must assess the club for the tax that should have been collected by the vendor and remit it to the State Board of Equalization directly. Accounts Payable will determine if a sales tax reporting issue is present. This assessment may result in a different amount recorded for disbursements than originally requested.

The reimbursement to the individual will remain unchanged. However, the club will be debited the reimbursement amount plus applicable taxes. Tax is treated as an adjustment and the

officers/advisor(s) are not normally notified about the adjustment. Such adjustments are viewable on the Transaction Reports which are available by request through ASI Club Services.

Another sales tax issue occurs when a club member pays out-of-pocket for club expenses and personal items on the same receipt. Be sure to include the appropriate sales tax to the reimbursement amount. Check the receipt for the appropriate sales tax rate since sales tax rates vary throughout California. ASI Club Services will adjust the sales tax if necessary. To simplify the payment process, club members should be encouraged to keep club and personal purchases separate.

### **Tax Rates**

As of June 2012, the following tax rates were in effect:

- For items delivered to Cal Poly, the tax rate is 7.25%. (Cal Poly is not considered to be in the city limits of San Luis Obispo.)
- For items picked up within the city of San Luis Obispo, the tax rate is 7.75%.
- The tax rates for other cities and/or counties may vary. Please check receipts for the appropriate reimbursable tax rate. The sales and use tax rates by city and county can also be found on the California State Board of Equalization's [web site](#).

### **Processing Delays**

Incomplete paperwork submitted for processing may cause processing delays. ASI Club Services attempts to minimize these situations by reviewing documents when received. However, if incomplete paperwork is submitted that will cause a processing delay, the listed club officer and/or advisor will be contacted and the incomplete paperwork will be placed in the club's mailbox. Once any issues are resolved, the paperwork can be resubmitted for processing.

### **Delinquent Accounts**

Clubs maintain account privileges by having a positive account balance. ASI Club Services prepares and distributes a list of clubs with delinquent accounts (i.e., negative account balance) monthly to all departments on campus where clubs are permitted to charge for products or services (e.g., audio visual, vehicle rentals, catering, etc.) These departments and vendors will likely not permit clubs to charge to their accounts if they are on the delinquent list.

New paperwork (e.g., Club PRFs, E-Plans) may not be processed until the club account has a positive account balance. A delinquent account could result in judicial proceedings against the club.

### **Financial Statements**

ASI Club Services provides transaction reports upon request.

## Gift and Donation Processing

### Credit Card Donations

All donations being made via credit card must be processed through the Cal Poly "Give a Gift" web site. Follow these directions to use the web site:

- Go to the Cal Poly [web site](#).
- Click on "Make a Gift" towards the top.
- Click on the "Give Online" button towards the right.
- In the "Select College and Program(s)" section, click on the "College" dropdown box and select "Student Affairs and Clubs." Click on the "Department" dropdown box and select the club you want to make a donation to. (If the club is not listed, select "Other" and write the club name in the "Special Requests" text box in the "Information About You and Your Donation" section.) Enter the desired donation amount.
- In the "Information About You and Your Donation" section, click on the "Your relationship to the University" dropdown box and select the appropriate option. Add any other requests in the "Special Requests" text box.
- In the "Enter Your Billing Address" section, enter your address (i.e., the address on file with your credit card company), phone number, and email address.
- Click on the "Continue" button.
- Please review the transaction. If everything is correct, click on the "Pay Now" button. This will forward you to PayPal to complete the transaction.

The donation will now be processed and deposited into the club's account.

**Note:** All donations made via the Cal Poly "Make a Gift" site will incur a 15% processing fee from University Advancement.

### Cash or Check Donations

For donations by cash or check, complete a Cash/Securities Gift Information form, available on the [Forms](#) section of the ASI Club Services web site. A separate form must be completed for each donation. Attach the check or cash to the form. Be sure to complete all required fields and have the club advisor print their name in the "Gift Received By" and sign the "Approved By" section. For security reasons, Cash/Securities Gift Information Forms can not be placed in the ASI Club Services drop box. Completed forms must be handed directly to an ASI Club Services representative at least 30 minutes prior to close of business. The donation will be processed and a deposit will be made to the club account.

**Note:** ASI Club Services does not charge a processing fee for donations made by cash or check.

### Donations of Supplies or Goods (Gift-In-Kind Acceptance Form)

For donations of supplies or other goods, complete a Gift-in-Kind Acceptance form. Attach all documentation supporting the acceptance of the gift and the value of the donation (i.e., as provided by



the donor). Be sure to complete all required fields and have the club advisor print their name in the “Gift Received By” section and sign their name in the “Approved By” section. Turn in all completed forms to ASI Club Services at least 30 minutes prior to close of business.

### **Gifts-in-Kind with a Value Greater Than \$5,000**

All gifts-in-kind with a value greater than \$5,000 are to be reported immediately upon receipt with a Gift-in-Kind Acceptance form available on the [Forms](#) section of the ASI Club services web site. All gifts-in-kind from individuals with a value more than \$5,000 and all gifts that require special expertise to establish the value, (e.g., works of art, horses) must include an appraisal executed by a qualified independent appraiser. The appraisal can not be made more than 60 days prior to the date of the gift. If the value of the gift in the appraisal is listed as a range of values, the gift will be booked at the midpoint of the range. In most cases, gifts-in-kind that are produced or manufactured by a corporation or other business making the contribution and that have a value more than \$5,000 must include an itemized inventory list, an invoice or letter from the vendor/donor, or published information on the value of the item(s). Gifts of equipment and software should be booked at the educational discount value (i.e., the value the university would have paid had the equipment or software been purchased from the vendor).

### **Gifts-in-Kind with a Value between \$100 and \$5,000**

All gifts-in-kind with a value between \$100 and \$5,000 are to be reported immediately upon receipt with a Gift-in-Kind Acceptance form available on the [Forms](#) section of the ASI Club Services web site. Written documentation provided by the donor is required to establish the value of the gift for all gifts-in-kind. Any gift-in-kind with a value in the range of \$100 to \$5,000 that is not accompanied by such documentation from the donor will be recorded on the university’s gift record system with a nominal value (\$1).

### **Gifts-in-Kind with a Value under \$100**

Cal Poly has established a minimum value for gifts-in-kind to be recorded on the university’s gift record system. Gifts-in-kind with a total value of less than \$100 will not be processed by University Advancement. The department or program accepting the gift is encouraged to acknowledge the gift, but no gift-in-kind paperwork is required.

### **Items Not Considered Charitable Contributions**

Based on CASE and FASB guidelines as well as IRS regulations, the following types of gifts-in-kind contributions are not considered charitable contributions and will not be included in the university’s annual fundraising totals:

- Use of real property
- Discounts on purchases
- Costs of appraisal
- Shipping costs
- Sales tax

- Permanent loans (i.e., property given to Cal Poly as a permanent loan will not be booked as a gift)

### **Additional Information for Gifts-In-Kinds**

#### **Gift Recipient**

The advisor must be listed as the recipient of the gift-in-kind on the Gift-in-Kind Acceptance form.

#### **Donee of Gift**

In general, the university (the state) is the donee for gifts of equipment that will be used to enhance the education of students on campus and for gifts-in-kind that will directly benefit the university. The Foundation is the donee for gifts of equipment that will be used for the enterprise ventures on campus, for all gifts of animals except for gifts of horses to the rodeo program, and for gifts-in-kind contributed with the understanding that the gift would be sold. ASI is the donee only for gifts-in-kind contributed to ASI programs.

#### **Qualified Appraisal**

A qualified appraisal must include the following information:

- A description of the property in sufficient detail for a person who is not generally familiar with the type of property to determine that the property appraised is the property that was contributed.
- The physical condition of any tangible property.
- The date (or expected date) of the contribution.
- The terms of any agreement or understanding entered into (or expected to be entered into) by or on behalf of the donor that relates to the use, sale, or other disposition of the donated property.
- The name and address of the qualified appraiser. Must include a disclaimer statement regarding any affiliation with the donor or the contributed property.
- The qualifications of the qualified appraiser who signs the appraisal, including the appraiser's background, experience, education, and membership in professional appraisal associations.
- The date(s) on which the property was appraised.
- The appraised fair market value on the date (or expected date) of contribution.
- The method of valuation used to determine the fair market valuation.
- The specific basis for the valuation, such as any specific comparable sales transactions.

#### **Gift-in-Kind Acknowledgements**

Gift acknowledgement letters and tax receipts for gifts-in-kind will only describe what was given and never include the estimated cash value or the appraised value of the gift. All donors making in-kind

contributions \$250 and above will receive an official tax receipt from University Advancement that includes the description of the gift and the gift designation.

When your club receives a donation and the proper process has been followed (e.g., via the Make a Gift web site, Cash/Securities Gift Information Form, Gift-in-Kind Acceptance form), the university will mail the donor an official tax receipt letter for their records. In addition to University Advancement and University President acknowledgements, club officers are strongly encouraged to write their own acknowledgement letters to thank donors.

## **ASI Club Funding**

In support of the ultimate college experience, ASI Club Funding is available to currently chartered clubs operating under contract with the university. Funding is available to enhance the cultural, educational, social, and recreational opportunities for all Cal Poly students.

### **Eligibility**

Chartered Cal Poly clubs are eligible to receive ASI Club Funding. Independent Student Organizations (ISOs) and student-run organizations that receive other funds supported through mandatory student fees, Instructionally Related Activities (IRAs), and College Councils are not eligible for ASI Club Funding.

### **Terms of Funding**

Clubs may apply for both ASI Club Sponsorship and ASI Event Co-Sponsorship funding with a maximum combined allotment of \$1,500 per club per fiscal year (i.e., July - June). For example, if your organization requests \$350 through ASI Club Sponsorship, your club is still eligible to apply for up to \$1,150 in ASI Club Event Co-Sponsorship for a maximum allotment of \$1,500.

All ASI Club Funding must be reconciled by the last day of the academic year. After that date any remaining ASI Club Funding will be removed from the club's account.

### **ASI Club Sponsorship (\$350)**

ASI Club Sponsorship is available at a maximum of \$350 per fiscal year. ASI Club Sponsorship is intended to support clubs with their general expenses.

### **ASI Club Event Co-Sponsorship (up to \$1,500)**

ASI Club Event Co-Sponsorship is available at a maximum of \$1,500 per fiscal year. ASI can provide funding up to 50% of the costs associated with hosting an event (not to exceed \$1,500 for a single event). The \$1,500 may be applied to one single event or multiple events. An application must be submitted for each event and the total awarded across all events may not exceed \$1,500.

A complete application accompanied by an E-Plan must be submitted to ASI Club Services no later than 14 days prior to the event.

### **Sport Club Funding (up to \$4,000)**

ASI Sport Club Funding is available for currently chartered sport clubs that are recognized by the Sport Club Council. Funding is available to assist with the expenses associated with supporting the activities of the sport club. Each organization that is granted ASI Sport Club Funding is ineligible to receive ASI Club Sponsorship or ASI Club Event Co-Sponsorship. The Sport Club Council is ineligible to receive ASI Club Funding.

The Sport Club Council must submit a Sport Club Funding Allocation Report, containing specific funding amounts for each sport club recognized within the Sport Club Council. The Sport Club Council will determine how much funding each individual sport club will receive. The total distribution of funds to the sports club may not exceed the amount allocated by the ASI Board of Directors and each individual sport club may receive up to \$4,000 in initial ASI Sport Club Funding.

**College Council Funding (\$424.00 + \$0.16 per Student per College)**

ASI College Council Funding is available for currently chartered College Councils. College Councils are only eligible to receive ASI College Council Funding and are ineligible to receive ASI Club Sponsorship or ASI Club Event Co-Sponsorship. College Councils are eligible to receive ASI College Council Funding with a maximum allotment of \$424.00 + \$0.16 per student per college per fiscal year.

## Event Plans (E-Plans)

For every club event, on or off campus, an E-Plan is required. An E-Plan serves as a tool for campus entities to coordinate and accommodate multiple campus events and assess each event for risk. All club events and meeting requests will be submitted via an E-Plan. E-Plans must be completed, approved, and submitted online. The E-Plan contains multiple deadlines, determined by the event's requirements and location. Any club member is able to initiate and create an E-Plan. The president and advisor will then be notified of the request and will be required to approve the request before it can be processed.

### Types of E-Plans

#### E-Plan Fast Pass

The E-Plan Fast Pass is designed to accommodate scheduling general club meetings/activities. An E-Plan Fast Pass can be submitted for:

- General meetings (2 hrs. or less)
  - Classrooms or UU Conference Rooms
- Sandwich Boards or Tri-fold Displays
- Information Tables or Booths (campus wide)
- Events involving:
  - Amplified sound/music
  - Parking permits
  - Renting equipment
  - Chalking (campus wide)

The E-Plan Fast Pass must be submitted online at least three business days prior to the date requested.

#### E-Plan Short Form

The E-Plan Short Form is designed to accommodate scheduling on-campus club events. An E-Plan Short Form can be submitted for:

- On-campus events and meetings (any length of time)
- Events involving:
  - Food or drink
  - Sale of merchandise
  - Showing a film/video
  - Use of Cal Poly names, symbols or marks

The E-Plan Short Form must be submitted online a minimum of seven calendar days prior to the date requested.

## E-Plan Long Form

The E-Plan Long Form is utilized to schedule club events that need multiple campus entity approvals. An E-Plan Long Form must be submitted for:

- Off-campus events
- Events located in:
  - Chumash Auditorium
  - UU 220
  - UU Plaza Stage
  - Performing Arts Center
  - Spanos Theatre
  - Mott Complex
- Events involving:
  - Alcohol
  - ASI Staffing
  - Contracts
  - Paid Service Providers
  - Travel

The E-Plan Long Form must be submitted a minimum of 14 calendar days prior to the date requested.

## Initiating the E-Plan

The E-Plan can be found on the [E-Plans](#) section of the ASI Club Services web site. After selecting “E-Plans,” the club member will be directed to the Cal Poly portal to authenticate their signature. Once authenticated, they will be routed to the E-Plan. To start a new E-Plan, select “Create a New E-Plan.” Depending on what type of event is being planned, the requestor must select between E-Plan Fast Pass, E-Plan Short Form, or E-Plan Long Form.

## Obtain Required Approvals

While any club member may initiate an E-Plan, the E-Plan requires approval from the president and advisor that are listed on the current Charter. As soon as the E-Plan has been created, a notification will be electronically sent to the president requesting approval. Once the president has approved the E-Plan, a notification will be electronically sent to the advisor requesting approval. The purpose of the advisor’s approval is to keep them informed about the club event details. Once the advisor has approved the E-Plan, ASI Facility Scheduling will process the request. Final approval may take several weeks.

**Note:** The president and advisor must approve the E-Plan prior to the specified deadline. If the E-Plan is not approved within the deadline, it will not be processed and a new E-Plan will need to be submitted with alternative event dates. Although some requests require shorter deadlines, it is highly recommended to plan ahead.

## **Checking the Status of an E-Plan**

The online E-Plan database allows you to check the status of an E-Plan that you have previously submitted or approved. To do so, locate your event and double click the status bar for specific information as to the status of the request.

### **Status: Pending President's Approval**

When looking at the status bar, if no bars have been filled, the E-Plan has been submitted to the president for approval, but has not yet been approved.

### **Status: Pending Advisor's Approval**

When one status bar has been filled, the president has approved the request, and it has been sent to the advisor for approval.

### **Status: Sent to ASI Facility Scheduling**

When two status bars have been filled, the president and advisor have approved the request, and it has been sent to ASI Facility Scheduling for processing.

### **Status: Pending Campus Approvals**

When three status bars have been filled, the ASI Facility Scheduling staff have entered the E-Plan into the facility scheduling system, however they are waiting for confirmation from other on-campus entities (e.g., Sage Catering, PAC, UPD) before the E-Plan can be confirmed.

### **Status: Confirmed**

When all four boxes of the Status Bar have been filled, the E-Plan has been confirmed. This means that the event is able to occur, and all requirements have been met and arranged.

### **Status: Denied**

When any step in the E-Plan process has been denied, a red box will appear in the status bar. The club will need to submit a revised E-Plan with corrections to further proceed with their event.



## Risk Assessment

Student Life & Leadership and ASI's goal is to assist student groups in having successful events in a safe environment. The following information is provided so that clubs may plan events that are safe and successful.

### Contracting for Services

When a club enters into an agreement with a service provider it is important to document the terms of the relationship in the form of a contract. Documentation protects the club while also ensuring that there are no misunderstandings regarding the terms of the agreement. Officers, advisor(s), and/or members of the club can not sign a contract or service agreement on behalf of their club.

All contracts must be submitted to ASI Club Services for processing. All contracts must be provided to ASI Club Services at least two weeks prior to the event date for review and signature. If the contracting entity requires a certificate of insurance, the process will take at a minimum of 30 days. Depending on the nature of the event, certificates of insurance may take between 60 to 90 days. A contract will only be processed if an E-Plan is attached to the contract.

**Note:** Contracts for certain events will not be approved by the university. Should the contract not be approved, you will be contacted by Student Life & Leadership with further instructions.

### Alcohol at Club Events

Alcoholic beverages are not to be served at off-campus functions by officially chartered Cal Poly clubs except when private service (i.e., for members and guests) is arranged by contract with a properly-licensed third-party vendor. Club members may not serve or provide the alcohol themselves. Individuals at the club event must purchase their drinks directly from the third-party vendor, leaving the club completely out of the alcohol transaction. The facility or caterer must have a valid Alcohol Beverage Control (ABC) license in order for the event to be approved. If a club is hosting an event at a location that does not already provide alcohol and an outside entity is hired to serve alcohol, the following is required:

- Contract with a licensed vendor
- E-Plan
- Proof that the vendor has an ABC license
- IRS Form W-9 for the vendor

In addition, each event must provide for the availability of popular non-alcoholic beverages for those persons less than 21 years of age. Students of legal age while attending an off-campus university-approved activity in the vicinity of a public bar may not have their rights denied except by representatives of the licensee or by civil law enforcement authorities for cause. If alcohol is available at an off-campus event, it must be noted on the E-Plan. In addition, any event involving alcohol at an off-campus location may require a meeting with Student Life & Leadership prior to the event taking place. If a meeting is necessary, a representative from Student Life & Leadership will contact a club officer to schedule the meeting.

Under no circumstances may club funds be used to purchase alcohol or to reimburse an individual for the purchase of alcohol (or purchase gift cards from companies that sell alcohol). For more information on alcohol at off-campus events, please refer to the Office of Student Rights & Responsibilities [web site](#).

### **Release of Liability Form**

ASI and the university do not provide accident/medical insurance for club members. If an individual is injured at a club event, he/she is personally responsible for any related medical expenses. When clubs sponsor activities with the potential for injuries, participants are required to complete a Release of Liability, Promise Not to Sue, Assumption of Risk and Agreement to Pay Claims form. Release of Liability forms can be found on the [Forms](#) section of the ASI Club Services web site. The Release of Liability form serves two important purposes: it notifies the participant that accident/medical insurance is not provided for the activity and it clarifies the responsibility of the individual, the university, and the club in situations when injuries occur. Release of Liability forms can be filled out at the event site but must be completed prior to the individual participating in the activity. Completed releases must be submitted to Student Life & Leadership the following business day, and will be kept on file for seven years. The Release of Liability form does not release clubs from the responsibility of providing a safe environment for the activity. Student Life & Leadership staff is available to provide risk management consultation during the event planning process. If there is any doubt as to the safety of an activity, please communicate concerns to an ASI Club Services or Student Life & Leadership staff member.

### **Off-Campus Activities**

Club events that take place at an off-campus location are required to submit an E-Plan. Failure to abide by the following guidelines or submit necessary paperwork will result in the university not recognizing the event as a university-approved event. In having an event not recognized by the university, the club assumes liability for the event instead of the university.

### **Open Bodies of Water**

Events that take place on open bodies of water are only allowed under contract with a licensed third-party vendor with appropriate insurance.

### **Ineligible Off-Campus Events and Activities**

Due to their high-risk nature, certain activities are not permitted to occur as Cal Poly club events. Ineligible activities include, but are not limited to, wine tasting, events at student private residences, and helicopter rides. The university, through Student Life & Leadership, will determine on a case-by-case basis whether an event or activity is deemed too risky to occur.

### **Insurance on Equipment or Borrowed Items**

ASI and the university do not have insurance coverage for equipment or other items borrowed for use by a club. Clubs have a responsibility to ensure that they are trained to use any rented equipment and follow safety procedures. Failing to do so endangers the ability of all clubs to obtain equipment, as well as increases the risk to the individual participants.

## Travel

As representatives of Cal Poly, proper conduct is essential during travel. Any improper behavior may affect the status of the club.

### Student Travel Request

When a club is traveling outside of San Luis Obispo County, they must submit the appropriate student travel request forms available on the [Forms](#) section of the ASI Club Services web site. Travel forms must be completed and submitted to ASI Club Services a minimum of 14 days prior to travel. These forms will indicate to the travel leader and advisor where the club is going, the method of transportation, the roster for each vehicle traveling, lodging accommodations, and when the club will return.

Your travel situation will dictate which travel forms you need to complete.

For travel inside San Luis Obispo County:

- Student Travel Request (CT - 1) (one per event)
- Student Transportation Request (CT - 2) (one per event)
- Student Travel Plan (CT - 4a/b) (one per event)

For travel outside of San Luis Obispo County:

- Student Travel Request (CT - 1) (one per event)
- Student Transportation Request (CT - 2) (one per event)
- Student Travel Plan (CT - 4a/b) (one per event)
- Air Travel Release Form (if flying) (one per passenger)

Each member travelling must complete:

- Student Travel Emergency Information Card (CT - 3)
- Release of Liability, Promise Not to Sue, Assumption of Risk and Agreement to Pay Claims

Each driver must complete:

- Volunteer Identification Form
- Authorization to Use a Privately Owned Vehicle
- Request to Operate Vehicles on State Business

Miscellaneous Forms to print and take:

- Student Travel Sign-Out Agreement (CT - 5) (print and leave blank)
- Vehicle Accident Report (print and leave blank)
- Incident Report Form (print and leave blank)

### Travel Binder

Before the club departs, an officer must pick up their Travel Binder from Student Life & Leadership. This binder must accompany the club when they are traveling. It includes:

- Copy of Club Student Travel Request Form
- Copy of Club Student Transportation Request Form
- Copy of Club Student Travel Plan Form
- Emergency Phone Numbers List
- Injury Report Forms
- Incident Report Forms
- Student Club Travel Sign - Out Agreements (CT - 5)
- Emergency Contact Cards (for each participant)

Travel officially begins when the club departs from the Cal Poly campus and ends when the group returns to San Luis Obispo County. If a participant wishes to depart from the club during travel and will not be returning with the club, they need to complete a Student Club Travel Sign - Out Agreement (CT - 5) prior to departing the group. Completed Student Club Travel Sign - Out Agreements (CT - 5) must be returned to Student Life & Leadership along with the Travel Binder when the club returns to San Luis Obispo.

### **Transportation**

- California law restricts drivers for non-profits and certain other entities from the use of any vehicle that is built or designed to carry more than 10 passengers unless they have the appropriate Class B license.
- Drivers of vehicles of that class have a great deal of additional liability for the safe operation and maintenance of the vehicle and safety for all passengers on board as well as several other responsibilities.
- The use of any vehicle within that particular class of passenger vehicles will not be approved.
- Only participants who submitted their Volunteer Identification form, Request to Operate Vehicle on State Business form, and copy of their California Driver License with a clean driving record are eligible to drive.
- If the club is carpooling and club members will be driving, they must be listed on the Student Transportation Request (CT - 2).
- Rental cars or vans must be rented from Enterprise Rent-A-Car.
- When clubs travel by air, Air Travel Release forms must be completed.

### **Private Vehicle Use for Events**

When you choose to use your personal vehicle for club business and indicate on your E-Plan that your club event will begin and end on campus, you must abide by the university's travel policy. Each driver is required to submit a Volunteer Identification form, Authorization to Use a Privately Owned Vehicle form, and a Request to Operate Vehicles on State Business form prior to the trip. All forms can be found on the [Forms](#) section of the ASI Club Services web site. For additional information on Cal Poly's Travel Policy, clubs may review the [Use of University and Private Vehicles Policy Guidelines](#) online.

The university does not provide automobile insurance for individuals who choose to use their personal vehicles for club activities. Each student driving a private vehicle is required to have the minimum amount of automobile insurance required by the State of California and possess a valid driver's license. Drivers are recommended to carry automobile insurance with the following minimum limits: \$50,000/\$100,000/\$15,000. Drivers should consult with their insurance agent regarding recommended limits to protect personal assets. Also, the privately-owned vehicle must be in a safe condition and have seat belts for the driver and each passenger. The university strongly recommends that clubs purchase the optional damage insurance whenever the club rents a vehicle for club use. The club member(s) who will drive the rental vehicle must complete an Authorization to Use a Privately Owned Vehicle form, obtain the advisor's signature, and submit the form to Student Life & Leadership prior to departure.

### **Lodging**

- Lodging accommodations must be listed on the Student Travel Plan Form (CT - 4a/b).
- If lodging accommodations change from those listed on the travel plan, Student Life & Leadership must be notified.

### **Incidents During Travel**

Should an incident or injury occur during travel, an Incident Report Form must be filled out and submitted to Student Life & Leadership within 48 hours of returning to campus.

If a problem develops off-campus, call appropriate law enforcement or medical agencies in the area. If the personal safety of any club member, participant, or spectator is endangered, professional assistance should be requested immediately. All problems must be reported directly and promptly to Student Life & Leadership at 756-2476.

## **On-Campus Activities**

### **Food Policy**

For most events held on campus where food will be available, the food must be ordered from Sage Catering. In addition, an application and orientation provided by Environmental Health and Safety will need to be completed. Events involving food will need to have an E-Plan on file. When the E-Plan is initiated, ASI Club Services will provide the club with contact information for both departments and will notify them of the pending event.

If a vendor is willing to donate food for an event, a Request for Donation form (which can be obtained at the Sage Catering office located next to The Avenue) must be submitted to the Sage Catering office a minimum of two weeks prior to the event for approval. Donated products must be delivered directly to Sage Catering and meet safety and health standards.

For further information about campus food policies, visit the Cal Poly Campus Dining [web site](#).

### **Food Safety**

All events on campus that involve food must follow the Campus Food Services [Policy](#).

### **Alcohol Policy for On-Campus Events**

Alcohol is not allowed for any on-campus event without a licensed third-party vendor (e.g., Sage Catering) and prior approval from the University President's office.

### **Amplified Sound Policy**

Outdoor events and activities that involve amplified music or speech are limited to the hours of 7 a.m. to 10 p.m. All such events or activities must be scheduled by a club through the E-Plan process and comply with any additional guidelines pertinent to a particular venue. Refer to [Campus Administrative Policies \(CAP\)](#) for more details about the campus-wide amplified sound policy.

Amplified sound may be used in the UU Plaza with allowed decibel rates beginning at 101 with spikes of 108. Amplified sound may be used between 11 a.m. and noon on Thursdays, during UU Hour. Amplified speech may be used between 11 a.m. and noon on Tuesdays for Free Speech Hour.

### **Sponsoring a Sporting Activity**

Clubs intending to sponsor a competitive sporting activity must submit a description of the activity and number of participants via the E-Plan process. Student Life & Leadership is responsible for providing guidance and approval for sporting activities. The Kinesiology and Athletics offices approve use of a requested sports facility, but ASI determines sporting activity needs. All individuals participating in sporting events must complete a University Activity Release Agreement to be submitted to Student Life & Leadership for processing following the event.

### **Activities Involving State Officials and/or Potentially Controversial Speakers**

For activities that involve state officials and/or potentially controversial speakers, large-scale events, or those that involve an unusual request, it may be necessary to obtain the signature of the Vice President for Student Affairs. Further, it may be necessary to hire security personnel to maintain a safe environment. Student Life & Leadership will make this determination.

## **Income-Producing and Fundraising Activities**

The Cal Poly Bookstore Director or designee must approve campus sale of goods that might be similar to merchandise available in the Bookstore.

### **Raffles and Giveaways**

Clubs are not permitted to hold raffles, including 50/50 raffles. However, giveaways are permitted. The distinction between raffles and giveaways is important for club officers to understand when completing paperwork as the two can not be used interchangeably.

**Raffle:** Selling raffle tickets to event participants for the sole purpose of being entered into a drawing to win a prize.

**Giveaways:** Giving tickets to event participants at no charge, and being entered into a drawing to win a prize.

### **Posting Flyers, Posters, and Banners**

In order to avoid cluttering Cal Poly's campus, guidelines have been developed for posting flyers, posters, and banners.

**Note:** Flyers and stake signs do not require an E-Plan but are subject to the policies outlines below.

### **Residential Life & Education**

The residence halls will only post flyers for events that have an E-Plan initiated. To have a poster advertising your event displayed in the residence halls, take 10 posters to the Residential Life & Education office, located in Building 31 Room 203, a minimum of seven days prior to the event date.

Due to limited space and fire safety concerns, one flyer per event will be posted in each hall. Posters must be on letter or legal-sized paper only (i.e., no newsprint posters will be accepted). All posters will be reviewed by Residential Life & Education for compliance to the policies listed in the Residence Hall Handbook.

All posters must have the sponsoring club or department name clearly indicated. All posting will be done by residence hall staff. Unapproved flyers will be removed.

### **Sandwich Boards**

The E-Plan process must be used to gain approval to set up sandwich boards. The maximum size for a sandwich board is 2'x4'. Sandwich boards can not be on display for more than seven days prior to your event and must be removed immediately following the event. All spaces for sandwich boards are assigned on a first-come, first-served basis. Sandwich board reservations will be accepted at the following locations on campus: UU Plaza, Dexter Lawn, Via Carta Mall, and Ag Circle. Sandwich boards displayed at other areas on campus will be removed from Cal Poly Facility Services.

### **Sandwich Boards for Recurring Events**

Approved locations for recurring sandwich boards are Dexter Lawn, Ag Circle, and Via Carta Mall (between Highland Dr. and North Perimeter Rd.).

- Maximum size for signs is 2'x4'

- Maximum time is one quarter
- Signs may not be placed on lawns or shrub areas
- Signs may not restrict access to sidewalks or building entrances
- Signs must be maintained by the sponsoring group

### **Banners in the University Union (UU) Plaza**

Vinyl banners displayed in the University Union Plaza shall be no larger than 3'x9' and may be attached to the railing using string or plastic twist ties. Paper banners may be affixed using blue painters tape available from the ASI Facility Supervisor. Banners may not be chained or locked to the railing, nor may they be affixed to concrete walls.

Banners may not be displayed for more than seven days. After seven days, the ASI Facility Supervisor will remove the banner and it will be stored in the Epicenter for 30 days. If the banner has not been picked up after 30 days, it will be disposed of.

### **Staked Temporary Signs**

- Letter-sized (i.e., 8.5" 11") signs may be placed on redwood lath stakes
- Signs may not advertise events for longer than one week
- Stakes on lawns will remain only until the lawn is mowed
- Signs last longer when placed in shrub areas
- Place your club's name on the side of the stake
- Signs may not be taped to buildings, trees, cars, traffic signs, walls, posts or trash cans
- Signs must clearly identify the name of the club sponsoring the activity

### **Posting and Distributing Materials Off Campus**

Clubs may distribute leaflets in any public place as long as they are handed to people and people accept them. Always get permission before putting anything up in a store window. To ensure goodwill between the university and the community, please remove all posters as soon as possible after the event.

### **If a Problem Does Arise at an Activity**

For on-campus problems, contact University Police at 756-2281. If the personal safety of any club member, participant, or spectator is endangered, professional assistance should be requested immediately. All problems must be reported directly and promptly to Student Life & Leadership at 756-2476.

### **Free Speech Policy**

Refer to [Campus Administrative Policies \(CAP\)](#) for more details about the Free Speech Policy.



## Contact Information

### **ASI Club Services**

Epicenter

Phone: 805-756-5807

Fax: 805-756-7121

Email: [clubservices@asi.calpoly.edu](mailto:clubservices@asi.calpoly.edu)

### **ASI Facility Reservations (E-Plan Assistance)**

Epicenter

Phone: 805-756-7587

Fax: 805-756-7121

Email: [eplan@asi.calpoly.edu](mailto:eplan@asi.calpoly.edu)

### **Student Life & Leadership**

UU, Room 217

Phone: 805-756-2476

Email: [studentlife@calpoly.edu](mailto:studentlife@calpoly.edu)