

# STUDENT ORGANIZATION GUIDE



**This guide is designed to provide helpful information regarding administrative policies and procedures for student organizations.**

Revised January 12, 2017

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To the CWSL Student Leaders of 2016,

Welcome! We look forward to working with you in the upcoming year. Student organizations enrich the law school experience. They provide extensive professional development, offer leadership opportunities, and create the California Western community and culture.

While there are many benefits to being a leader of an organization, the job also comes with responsibility and accountability. This guide is your “go-to” reference for the different processes and requirements of operating a student organization. Here you will learn how it covers various aspects, from navigating the budgeting process to sponsoring a schoolwide event.

The Student Bar Association is always available to help any organization by coordinating events, bringing new ideas to fruition, and fostering collaboration between different organizations. We look forward to working with you in the upcoming year.

Sincerely,

Joseph K. Bruno, SBA President  
Crystal Y. Case, SBA Chairperson of the Board

# STUDENT BAR ASSOCIATION

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## **Mission Statement**

The purpose of the Student Bar Association (“SBA”) is to establish and operate a student government that fosters ideals of scholarship, service and ethics. The SBA also promotes the general student welfare and represents the members of the student body in all the matters affecting the school.

The SBA invites all students to get involved by joining one of the committees such as Barrister’s Ball, Student Space Committee, or Community Outreach Committee, by attending an SBA meeting (open to all), or joining an SBA intramural sports team.

Contact the SBA President for more information about becoming involved at [SBApres@law.cwsl.edu](mailto:SBApres@law.cwsl.edu).

## **SBA Executive Board**

President	Joseph Bruno
Vice President	Juan Larios
Treasurer	Briana Collings
Administrator	Sara Ebert
Webmaster	Danasia Neal
ABA Representative	Taylor Williams
FBA Representative	Alex De Arana-Lemich
SDCBA Representative	Evangeline Dech
Director of Activities	Samantha Chorny
Director of Intramurals	Reed Baker
Co-Director of Public Relations	Juan Forero
Co-Director of Public Relations	Lauren Romans
Commentary Editor-in-Chief	Andrew Lajoie
Alumni Representative	Logan Fennacy
Alumni Representative	Alana Watts
Ombudsman	Shaian Mohammadi

**SBA Board of Representatives (BOR)**

Chair of BOR	Valerie Gurrola
Assistant Chair of BOR	Jesse Schram
3L Representative	
3L Representative	Melissa Kidwell
3L Representative	Jennie Krauser
3L Representative	
2L Representative	Valerie Gurrola
2L Representative	Vladana Dervisevic
2L Representative	Jesse Schram
2L Representative	Kevin Serrano
1L Representative - §1	Dustin Cantwell
1L Representative - §2	Jesselyn Chong
1L Representative - §3	David Brooks
1L Spring Representative	

Check us out on [Facebook](#) as well as [www.cwslsba.org](http://www.cwslsba.org)!

# STUDENT ORGANIZATION ADMINISTRATION

## **Student Organization Officers**

Student organization leaders play an important role within California Western School of Law. Student organizations create both professional and social opportunities for students and continuously encourage involvement throughout the year. The experience to participate in a student organization is an invaluable experience for a law student.

### **a) List of Officers**

Student organizations must submit a full list of their elected officers by the end of the first full week of classes to [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu). Because the Assistant Dean for Student & Diversity Services oversees and approves expenditures from the SBA accounts, it is crucial that the office has an updated list of the officers authorized to commit the organization's funds.

Please note that failure to submit contact information may result in:

- i. Inability to receive SBA funding during the trimester
- ii. Reduction in funds awarded by the Board of Representatives
- iii. Delay in communications regarding scholarships and other opportunities for the organization.
- iv. Missing important information from administration or other student leaders.

### **b) E-Mail Account**

Each student organization has an official CWSL e-mail address. This is the e-mail account disseminated to the public and others who might be interested in your organization. Please contact [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu) to obtain your organization's email and password.

#### **i. Security**

CWSL has a security setting on the student email system that limits any account from sending more than 100 email messages in an hour. If an account tries to send more than 100 in an hour, the email account is disabled. If your organization needs to have this limit raised, please contact [dstarnes@cwsl.edu](mailto:dstarnes@cwsl.edu) for an adjustment.

If you receive the following message: *"Your mailbox is almost full, click [here and enter your username and password to get more mailbox space](#)",* **DO NOT** respond as this is a phishing message.

#### **ii. Passwords**

Passwords are changed at the end of each Summer Trimester. Student & Diversity Services will distribute the updated passwords to current, authorized student organization board members.

If you misplace or forget your password, please contact [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu).

**c) Webpage**

The SBA provides a website for student organizations at <http://cwslsba.org/>. Please use your webpage to list the mission of the organization, current board members as well as to announce meetings and events in more detail.

**d) TWEN**

Please contact Westlaw directly regarding setting up a TWEN page or gaining access to an existing page as a new Administrator.

Please contact 1-800-486-4876 or [west.twensupport@thomson.com](mailto:west.twensupport@thomson.com).

**e) Elections/Transition of Officers**

In order to help the incoming officers perform their leadership duties, it is strongly suggested that each organization create a “*How To*” guide. The guide should include information regarding administrative procedures, such as the Student Organization Guide, as well as any community contacts the organization may be affiliated with. This guide should be amended as appropriate at the end of the officers’ term(s).

**Student Organization Room**

The Student Organization Room is located in the 350 Building on the Lower Level. Lockers, cubicles and mailboxes for student organization are located here. Locker and cubicle space for student organizations is a privilege, not a right. Please be considerate of the organizations and individuals with whom you are sharing space.

Please contact [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu) to find out the locker and/or cubicle number for your organization or to request one.

During final examinations the lounge is used by Faculty Support for testing. An email notice will go out with instructions to clean out your cubicle and locker area. **This is a mandatory cleanout.**

**a) Lockers**

The President and Vice President of each organization may be issued locker keys. To obtain a key:

1. Pay the \$10.00 deposit in the Business Office (you will receive a receipt).
2. Take the receipt to the security desk in the 350 Building lobby.
3. Keys must be returned to Security at the end of the President/Vice President’s term.

**SAFETY NOTE:** Items should never be stored on top of the lockers as they are a safety hazard. Any items placed on top of the locker will be removed and discarded by facilities at any time without notice.



**b) Cubicles**

To obtain a cubicle name plate, send your request to [StudentServices@cwsu.edu](mailto:StudentServices@cwsu.edu). The cost for a name plate averages \$16.00. Your student organization will be invoiced when the name plate arrives.

Please fill out a [Student Organization Vendor Check Request Form](#) (Appendix M) and submit (with invoice) to the SBA Treasurer.

**c) Mail**

The school's administrative address (225 Cedar Street, San Diego, CA 92101) may only be used for student organization mail. Personal student mail is not permitted at California Western. Please ensure that mail is addressed to the name of the student organization.

The SBA Administrator will pick up student organization mail on a weekly basis and distribute to the student organization mailbox which is located in the Student Organization Room.

Student organizations may mail letters and packages at the main reception desk located at:

*225 Administration Building, First Floor  
Monday – Friday  
8:00 a.m. to 5:00 p.m.*

Must have cash for the postage.

**d) Supplies**

Student organizations are responsible for ordering their own supplies and should have a budget already set aside for any supplies it may need.

# STUDENT ORGANIZATION EVENT

## POLICIES & PROCEDURES

Student Organization events play a critical role in enriching the law school experience. Student Organization events should relate to the mission of California Western School of Law.

Once your organization decides to host an event, there are key event planning decisions to be made, such as:

- What type of event is it?
- Where will the event be held? (at CWSL or off-campus?)
- When will the event be held? (Certain events require at least 6 months planning).
- Who is your target audience?
- How to publicize your event?
- How to pay for your event?

Important points for **every** event:

1. Read the entire Student Org Guide. Event planning guides and checklists can be found in the Appendix section.
2. For every event a [Student Organization Event Approval Form](#) must be completed (see Appendix C).
  - Forms are located on the SBA website at <http://cwslsba.org/>.
3. If the media is being invited to your event, you must notify Marketing & Communications in advance at [News@cwsl.edu](mailto:News@cwsl.edu).
4. If you are charging to non-CWSL individuals or organizations for your event, then review the CWSL [Room Booking Policy](#) (page 20) for applicable room rental fees.
5. CWSL's alcohol policy applies to ALL on-campus events (see CWSL [Room Booking Policy](#), pages 14-17).
6. Keep good records.
  - Keep track of all aspects of event planning AND keep track of all receipts so you can be reimbursed.

## **I. WHAT TYPE OF AN EVENT ARE YOU PLANNING?**

Every year CWSL student organizations plan many types of events. Most events are on-campus, such as meetings, speakers/panel discussions, fundraising (bake sales), community service, networking and movie screenings. Off-campus events are usually networking/mixers, community service and fundraisers.

Key information to help plan an event is summarized as follows:

### **A. Meetings**

Student organizations must follow their individual charters regarding meetings, however it is suggested that every meeting should include the following:

- Agenda
- Minutes
- Action Items

Student organizations can forward each General Meeting's agenda to the SBA in order to have them posted on the SBA website and available on hard copy in the SBA Student Organization binder (located in the SBA cubicle). If interested, please contact [SBAAdmin@law.cwsl.edu](mailto:SBAAdmin@law.cwsl.edu).

The SBA requests the minutes from General Meetings throughout the semester. These will not be posted online but are requested as a matter of record. Please forward materials to SBA Administrator at [SBAAdmin@law.cwsl.edu](mailto:SBAAdmin@law.cwsl.edu).

### **B. Speakers/Panel Discussions**

No more than two (2) student organization-sponsored speakers will be allowed on a given date, and no student organization-sponsored speakers will be authorized on the same date as a Faculty Development speaker.

#### Resources:

#### A). Speakers

The Career and Professional Development Office is a resource for finding speakers. Please contact them at [Career\\_Services@cwsl.edu](mailto:Career_Services@cwsl.edu).

#### B). Thank You Gifts

If you would like to order a signature gift (24 items or more, i.e. mugs, lapel pins, writing pens) specific to your student organization please contact David Crowell in Institutional Advancement ([drc@cwsl.edu](mailto:drc@cwsl.edu)).

- Gift cards are **not** allowed.
- Gifts will be charged to the organization. Please make sure to budget for these items.
- Signature gifts may take up to 30 days to arrive, so please plan accordingly.
- Honorariums
  - Maximum allowed is \$100.00 (no gift cards)
  - Not allowed for CWSL Faculty or Staff

C). MCLE

If you are interested in providing Mandatory Continuing Legal Education (MCLE) credits, please refer to Appendix B for procedure and tips.

**C. Fundraisers**

Student organizations may raise money for dues accounts and/or charitable donations. All fundraising activities must be approved by the Assistant Dean for Student & Diversity Services. All California Western policies apply to student organization fundraising events and activities (e.g. room booking, Business Office, etc.).

a) Charitable Donations

Fundraisers for a charitable donation (i.e. auctions) must be approved by the Assistant Dean for Student & Diversity Services and the Development Department at least three (3) months in advance of the fundraiser. Requests submitted less than three (3) months in advance may not be approved. Please see Appendix A for policy and procedures.

- Student organizations are encouraged to meet with the Development Department once the event is approved to discuss fundraising strategies, materials and beneficiary.

b) Dues Account

Fundraisers for a student organization's dues account (i.e. food sales) must be approved by the Assistant Dean for Student & Diversity Services. No more than two (2) food sales are permitted per week, and they cannot be held on the same day. Please see Appendix A, section 4.2 for policy and procedures.

**D. Philanthropy (Community Service, Donation Bins)**

The SBA requires each SBA-recognized student organization to perform a minimum of one philanthropic activity per trimester (summer trimesters are exempted *if* the organization is not active during the summer trimester). The SBA may coordinate philanthropic events for student organizations to choose from to satisfy the requirement or student organizations may choose to do their own philanthropy.

**E. Networking/Mixers**

Building relationships among other students, alumni and legal professionals is a key skill for a rewarding legal career and an opportunity to balance out the rigors of studying for most students.

CWSL's alcohol policy applies to ALL on-campus events (see CWSL [Room Booking Policy](#), pages 14-17). If the networking/mixer is on-campus then the event host **must** hire a company for bartending services with a valid permit to serve alcohol at the event. A copy of the company's vendor license and insurance policy must be submitted to the Student & Diversity Services office with the Event Approval Form.

At all networking/mixer events with alcohol, event hosts are encouraged to prevent intoxication by:

- Providing for a sufficient amount of alternative, non-alcoholic beverages;
- Providing a sufficient amount of substantial, wholesome food; and
- No self-service of alcohol.
- Event hosts are legally responsible to insure CWSL policies and all applicable laws are complied with.

Further, student organizational funds shall not be used for the purchase of alcohol at student organization events, except Barrister's Ball. Individual members may purchase alcohol for personal consumption at off-campus events, but students will NOT be reimbursed for any alcohol purchased at an approved event from student organizational funds (SBA budgeted or dues account).

#### **F. Conference/Symposiums**

CWSL has a strong tradition of hosting student organized conferences such as the Business Law Conference and Entertainment & Sports Law Symposium. Successful conferences and symposiums require at least 9 months to plan and must be held during times when other major campus-wide events are not being held.

- If a student organization is hosting an event on campus and wishes to charge admission, CWSL is required to also charge the student organization a room rental fee at its standard rate.

In addition, you cannot require a "contribution" to attend a student event held on campus to avoid this policy. (See CWSL [Room Booking Policy](#)).

While in the event planning stage, student organizations should consult with Student & Diversity Services, Career & Professional Development Office, Alumni Affairs and Marketing & Communications.

#### Resources:

##### A). Thank You Gifts

If you would like to order a signature gift (24 items or more, i.e. mugs, lapel pins, writing pens) specific to your student organization please contact David Crowell in Institutional Advancement ([drc@cwsl.edu](mailto:drc@cwsl.edu)).

- Please note gift cards are **not** allowed.
- Gifts will be charged to the organization. Please make sure to budget for these items.
- Signature gifts may take up to 30 days to arrive, so please plan accordingly.
- Honorariums
  - Maximum allowed is \$100.00 (no gift cards)
  - Not allowed for CWSL Faculty or Staff

B). MCLE

If you are interested in providing Mandatory Continuing Legal Education (MCLE) credits, please refer to Appendix B for procedure and tips.

## G. Movie Screenings

All events at CWSL must comply with the law school's institutional mission. Before deciding on your movie, review the ***Compatibility with Institutional Mission*** section of the CWSL [Room Booking Policy](#)).

Due to copyright laws, student organizations interested in showing a film must have written permission from a licensing agent, unless the film is already in the public domain. Don't forget to fill out a room booking request form as well as an email to Audio Visual ([EdTech@cwsl.edu](mailto:EdTech@cwsl.edu)) for A/V needs.

- **How to Obtain Copyright Permission**

Student organizations must obtain a Public Performance License from a licensing agent (i.e. [Swank Motion Pictures, Inc.](#)) to show a film. Some film makers are happy to charge only a token fee, others may request more.

You will need to be very specific when requesting permission and include the following information:

1. Indicate whether the screening is open to the public or for the California Western community only.
2. Indicate the number of people you expect to view the movie.
3. Indicate if you will be charging a fee.
  - Once you obtain written confirmation you must submit a copy to [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu).

- **Public Domain**

"Public Domain" refers to the body of creative works and knowledge in which no person, government or organization has any proprietary interest such as a copyright. Below are a few sites that contain movies commonly thought to be in the public domain, and works their owners are willing to let be distributed:

<http://www.fesfilms.com/>

<http://www.desertislandfilms.com/>

<http://www.reelmediainternational.com/>

<http://www.buyoutfootage.com/>

<http://archive.org/details/movies>

- **Admission Fees**

If you are charging a fee for your event to non-CWSL individuals or organizations, then review the CWSL [Room Booking Policy](#) (page 20) for applicable room rental fees.

## II. EVENT SCHEDULING: Master the CWSL Calendars

In addition to a full schedule of classes, CWSL books more than 5,000 other room requests annually, including meetings, social events, academic events, student organization events, competitions, and community events. Start planning your event as soon as possible especially if it is a signature event such as a conference, large fundraiser, well known speaker, etc.

When choosing a date, review the [CWSL online calendar](#) to find out if there is a conflict with another event.

Some additional considerations:

- Event Approval Form must be made well in advance and **no less than 4 business days prior** to the event. Student & Diversity Services and Facilities make every attempt to respond to a request within 48 hours from the date and time of receipt of the original request. To avoid potential problems, it is strongly recommended you submit the request as soon as possible.
- Student groups who wish to book a room may do so in the current or next trimester. Exceptions to this may be made with the approval from Student & Diversity Services for annual student events, etc. Rooms booked in advance of the next trimester are subject to being bumped when the next trimester's class schedule is programmed into the schedule, as classes take priority over all other events.

## III. EVENT LOCATION: Where will the event be located?

### A. Off-Campus Events

Planning a Student Organization event held off-campus requires Student & Diversity Services approval as stated above. The next steps are dependent on the type of event being planned.

Key items to consider:

- Checking the [CWSL online calendar](#) for the best date for the event
- Securing a location
- Reviewing Student Organization Reimbursement Policy regarding alcohol purchases for student organizations.
- Consulting with the resources at CWSL
  - Networking/Mixers: Career & Professional Development Office, Alumni Affairs
  - Fundraisers: Development, Student & Diversity Services
  - 501(c)(3) Statement, CWSL Insurance Certificate – Business Office
  - Community Service – other student organizations, CWSL departments

## B. On-Campus Room Booking Procedures

### a. Overview

CWSL provides access to rooms such as classrooms and lobbies to student organizations for meetings and events. Before selecting your on-campus location, review the CWSL [Room Booking Policy](#) to learn important policies regarding:

- Table displays
- Posting of notices
- Bake/food sales
- Serving of alcohol
- Marketing of your event off-campus
- Compatibility with Institutional Mission (includes information on admittance fees)

Student organizations may book the First and Second Floor lobbies in the 350 Building for purposes consistent with the mission of the student organization such as event sign-ups, ticket sales, bake sales, blood drives, etc.

Please note that the display tables are allotted on a first-come, first-served basis and due to space limitations, not all requests will be approved.

- **First Floor Lobby**  
Any day of the week for a maximum of two (2) days per week
- **Second Floor Lobby**  
Tuesdays and Thursdays

### b. Step by Step Guide to Booking Your Room

1. Student organizations must fill out a [Student Organization Event Approval Form](#) (see Appendix C). Forms are located on the [SBA website](#). This form will be automatically submitted to the office of Student & Diversity Services for approval. Please note that there is up to a **48-hour reply time**.
  - Requests made over the phone, via voicemail, or verbally in person will not be accepted. There will be no exception to this rule.
2. Once approved, Student & Diversity Services will email the approval to the student organization and Rooms (for room booking confirmation). Please note that there is up to a **48-hour reply time** for Rooms to process the request.



3. Once you receive your room booking confirmation from Rooms, you should:
  - 1) Request any special set-up such as tables and chairs, extra trash cans, etc. by forwarding your room confirmation e-mail to [Facilities@cwsl.edu](mailto:Facilities@cwsl.edu). NOTE: If tablecloths are needed you must request them **two weeks prior** to the event.
  - 2) Request Audio Visual equipment such as microphones, projectors, etc. by forwarding your confirmation e-mail to [EdTech@cwsl.edu](mailto:EdTech@cwsl.edu) at least 72 hours in advance of the event.

#### IV. **EVENT ADVERTISING: How to Get the Word Out**

##### I. **POSTING**

###### a) **CWSL Online Calendar**

Once the event has been approved and the room booking confirmed, Student & Diversity Services will add the information to the [CWSL online calendar](#).

###### b) **350 Lobby Monitor**

Once the event has been approved and the room booking confirmed, Student & Diversity Services will add the information to the monitor in the first floor lobby of the 350 building for inclusion in the Weekly Events slides.

- Approved posters may be submitted to [studentservices@cwsl.edu](mailto:studentservices@cwsl.edu) for inclusion in the Weekly Events slides. Submissions must be received by 2:00 p.m. the Friday before.

###### c) **E-mail Blasts**

Please note that e-mail blasts to the student body are not allowed unless it is for an SBA event for the entire CWSL Community (which includes Faculty, Staff and Students) such as Barrister's Ball, CWSL Talent Show, etc.

###### d) **Social Media**

Marketing & Communications can assist student organizations in promoting events through the CWSL social media channels, website, and newsletters. Please contact [SocialMedia@cwsl.edu](mailto:SocialMedia@cwsl.edu).

Student organizations are encouraged to have all members follow the CWSL social media channels to stay up to date with all CWSL news and events:

###### **Facebook**

<https://www.facebook.com/cwslstudentlife>

###### **Instagram**

[www.instagram.com/CaliforniaWesternSchoolofLaw](http://www.instagram.com/CaliforniaWesternSchoolofLaw)

###### **Twitter**

[www.twitter.com/CWSL\\_News](http://www.twitter.com/CWSL_News)

### e) Posters/Flyers

Student organizations must get advanced, written approval from Student & Diversity Services in order to display posters in the First and Second Floor lobbies of the 350 Building.

It is recommended that you send a digital proof to [StudentServices@cwsu.edu](mailto:StudentServices@cwsu.edu) prior to printing in order to avoid additional printing costs in the event the poster needs to be edited for content (examples of prohibited content: guns, images or references to alcohol, profanity, etc.).

- If you are using an image that you found on the internet you must make sure you are not violating copyright law. Please review the [“Using Images Created by Others”](#) policy (see Appendix I).

Event flyers may be attached on the SBA Bulletin Board on the second floor, next to balcony doors, in the designated area. Posters should be removed after the event. Questions? Contact SBA Administrator at [SBAAdmin@law.cwsu.edu](mailto:SBAAdmin@law.cwsu.edu).

Please note that **flyers are not allowed** in any other areas of campus. Please review the [“Posting of Notices and Announcements”](#) policy (see Appendix G).

## II. PRINTING

### a) Copy Center

You may submit items for copying to the on-campus Copy Center located in the Faculty Support Services Office (225 Administration Building, Third Floor). Please provide adequate time for them to make copies, especially during exam periods. Your charges will be billed to your organization’s account.

### b) External Vendors

You may use any vendor for copying services, but you may not establish accounts for billing to the law school. You will be held personally responsible for any accounts set up for your student organization.

When working with external vendors, you may:

- Pay the bill and submit a [Student Organization Reimbursement Form](#); or
- Obtain an invoice and submit a [Student Organization Vendor Check Request Form](#) to request payment by check. Please note it can take up to two (2) weeks for the Business Office to complete the process.

# STUDENT ORGANIZATION FINANCIAL POLICIES

CWSL students are charged a student activity fee (\$50) for each trimester in which they are enrolled. A portion of the fee (\$38) is distributed to the SBA to fund SBA and SBA-recognized student organizations' activities. The rest is applied to commencement related expenses.

All student organizations recognized by the SBA are eligible to receive funding. Each trimester active organizations seeking funding must submit a request for funds through a formal process known as a Budget Hearing. Once an organization has been granted funds by the SBA Board of Representatives it is able to request reimbursement of funds or to pay a vendor for an approved event.

## I. How do I pay for event expenses?

### A. General Rules

There are a few expenses which will **NOT** be reimbursed:

- Gift cards
- Alcoholic beverages

CWSL Business Office policies determine reimbursable expenses. If you are not sure whether your expense is reimbursable, please contact the Assistant Dean for Student & Diversity Services.

### B. Things to Know

Student organizations have two main sources of funding:

#### 1) SBA Allocated Funds

The SBA Board of Representatives allocates funds to organizations each trimester. All SBA funded events must be open to the entire student body.

#### 2) Student Organization Dues Account

Student organization funds collected from members either on a trimesterly or yearly basis.

### C. Before the Event

Prior to the event, there are two options to pay for event expenses:

- 1) Payment by check directly to the vendor, or
- 2) Student Organization Advance Request (SOAR)

Both methods require completed forms to be submitted **at least 14 calendar days** before payment is due. **All general rules from section 1, page 19, apply.**

**1) How do I pay an outside vendor directly?**

**a) Things to Know**

The [Student Organization Vendor Check Request Form](#) (see Appendix M) is used to pay a vendor directly for goods and/or services relating to student organization activities.

Student Organization Vendor Check Request Forms are located on the [SBA website](#) as well as in the SBA cubicle inside the Student Organization Room (350 Building, Lower Level, Cubicle #1).

- Vendor Check Requests will only be processed if the event was approved by Student & Diversity Services and:
  - 1) The student organization's budget has been approved by the SBA; and/or
  - 2) There are sufficient funds in the student organization's dues account

**b) Procedure for Outside Vendor Payments**

1. Obtain a [Student Organization Vendor Check Request Form](#) from the SBA cubicle or the [SBA website](#) and complete with relevant information (see Appendix M).
2. Attach a detailed invoice from the vendor that contains the following:
  - Name of the company or payee that provided the goods and/or services
  - Description of the goods or services provided
  - Client name listed as California Western School of Law c/o [STUDENT ORGANIZATION]
  - Amount due
3. Attach a Form W-9 if the vendor/payee is new (please check with the Business Office).
4. Include a valid business purpose – necessary per I.R.S. regulations.
  - This should accurately describe the event and the purpose of the event. For example, “t-shirts” is not sufficient. However, “t-shirts for student initiation ceremony” is sufficient.

5. Submit completed form with all attachments to the SBA Treasurer **at least 14 days prior to when the check is needed.**
6. The Business Office processes check requests once a week. After the SBA Treasurer processes the request, s/he obtains approval from the Assistant Dean for Student & Diversity Services.
7. The approved request then goes to the Business Office. You will be contacted when the check is ready to be picked up by the Business Office. The entire process can take up to two (2) weeks.

## 2) **Student Organization Advance Request (SOAR)**

### a) **Things to Know**

For student organization expenses in excess of \$100.00, student organization members may request an advance of funds. The amount requested must be available in the dues account or approved by the SBA through budget process.

### b) **Procedure for advance**

Student must complete a [Student Organization Advance Request Acknowledgment Form](#) (SOAR) (see Appendix J) available on the [SBA website](#). The process may take up to 14 calendar days. Plan accordingly.

- If amount requested is in excess of \$350.00, attach quote to support advance request.

The completed SOAR form must first be sent, via e-mail, to the SBA Treasurer ([SBATreas@law.cwsl.edu](mailto:SBATreas@law.cwsl.edu)) who will confirm via return e-mail that the funds are available. The confirmation e-mail must be attached to the request before submitting to the ADSDS.

- i. Once approved by the Assistant Dean the form will be submitted to the Business Office for processing.
- ii. The Business Office will follow its normal check issuing procedure (i.e. requests submitted by close of business on a Wednesday will be available for pick-up on Friday of the following week).
- iii. Students will have **14 calendar days** from the date of the check to submit the [Student Organization Advance Request Reporting Form](#), (see Appendix K) available on the [SBA website](#), with supporting documentation and original receipts to SBA Treasurer.

- iv. Failure to submit the required documentation and/or return any unused cash by the deadline may result in the following actions at the discretion of the Assistant Dean:
  - a) **Amount may be reported to the Internal Revenue Service as compensation to the student.**
  - b) **Student may have a Business Office hold placed on the student's account.**
  - c) **Student Organization may be prohibited from further reimbursements during the trimester.**
  - d) **Student Organization may be prohibited from seeking SBA funds the following trimester.**
  - e) **An Honor Code violation may result.**

## **II. After the Event – How do I get paid for funds I spent for the event?**

### **a) Things to Know**

Every event MUST be approved by Student & Diversity Services. Reimbursements will only be processed if the student organization's budget has been approved by the SBA and/or there are sufficient funds in the student organization's dues account.

### **b) Procedure**

1. Obtain a [Student Organization Reimbursement Form](#) from the SBA cubicle or the [SBA website](#) and complete with relevant information (see Appendix L).
2. Include a valid business purpose.
  - This should accurately describe the event and the purpose of the event. For example, "lunch meeting" is not sufficient. However, "lunch meeting to discuss the organization's trimester events" is sufficient.
3. Attach original and itemized receipts reflecting the method of payment (cash, check, credit card). Under exceptional circumstances, if you are unable to obtain an itemized receipt, a written detailed description of what was purchased must accompany the receipt showing payment was made (see Appendix N).
  - If you are unable to obtain an itemized receipt for purchases of \$75.00 and higher, you must submit a [Student Organization Missing Receipt Form](#) (see Appendix O).

- If a check was used to pay the expense, you must attach a copy of the cancelled check (front and back)
- 4. Submit completed form with all attachments to the SBA Treasurer within 60 days of the event. **Submissions received past 60 days will be denied.**
- 5. The Business Office processes reimbursement requests once a week. After the SBA Treasurer processes the request, s/he obtains approval from the Assistant Dean for Student & Diversity Services.
- 6. The approved request then goes to the Business Office. The entire process can often take up to two (2) weeks.

# MARKETING & COMMUNICATIONS

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The Marketing & Communications department at California Western School of Law manages all print publications, media relations, branding (logos, etc.), and the official CWSL News blog, Facebook, Twitter, LinkedIn, and YouTube channels, among other responsibilities.

Student organizations wishing to include the official California Western nameplate (logo) on brochures or materials must contact [News@cwsl.edu](mailto:News@cwsl.edu). Those using the school nameplate will be required to comply with the official Style Guide and provide a copy of the final product.

If you are inviting members of the media to an on-campus event or class, you must inform Security and Marketing & Communications. Our security policies require that the Director of Marketing & Communications be informed when media are on campus.

Student organizations with compelling stories to share (i.e. service projects, tutoring, major accomplishments, etc.) are welcome to submit those stories to Marketing & Communications for consideration. Here are some tips to keep in mind when promoting your projects and news items, either to the Marketing & Communications department or to the media/public through your own efforts:

- Be prepared to explain why your news item is interesting – what’s different about it?
- Explain how your news item supports or demonstrates concepts you are learning in law school
- Provide just enough useful information (who, what, when, where, etc.) with a contact name and information for follow-up
- Provide a few days’ notice, not the day of or day before an event
- If seeking coverage after an event or newsy development, follow up right away; news can get “stale” very quickly
- Include photos, if you can

## **Social Media Guidelines for Student Organizations**

All student organizations must comply with the CWSL Social Media Guidelines (see Appendix H) approved in January 2014.

The guidelines provide appropriate best practices for California Western student organizations with social media channels in order to maintain a professional online presence for the law school and to protect the reputation of the law school.



# STUDENT & DIVERSITY SERVICES

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The office of Student & Diversity Services offers a wide range of services to students including counseling, advising and assisting students in solving problems and tackling issues that may interfere with their academic progress. The office also provides support for student organizations and serves as the primary administrative liaison on campus. Please feel welcome to contact us at any time with questions. If we do not have the answer, we will find it for you.

## **OFFICE STAFF**

### **Susan Finster, Esq.**

#### **Assistant Dean for Student & Diversity Services**

Dean Finster provides leadership, management and direct services in the area of student affairs and is responsible for counseling students on academic and non-academic issues, reviewing petitions, implementing support programs and managing disability services. In addition to advising for more than thirty student organizations, she works closely with the Student Bar Association. In collaboration with the Dean of Student Life, Dean Finster helps resolve disciplinary issues, including investigating Honor Code violations and student conduct complaints. She also oversees Commencement, the annual Student Awards Program, and many other campus events and programs.

### **Marion Cloete**

#### **Director of Diversity Services**

Marion Cloete facilitates the recruitment of underrepresented and non-traditional students to California Western. Director Cloete has improved the number of students from geographically and socially diverse environments tremendously. She attends local, regional and national law school fairs throughout the year. She coordinates events and support services that are designed for these students and their particular needs, including the Buddy Program, which provides peer mentors for new law students, and non-academic counseling and intercultural skills programs. She is also the liaison to many diversity student organizations, including the Diversity Coalition and assists them in coordinating mentor programs, bar scholarships and organization web sites.

### **Monique Taylor**

#### **Administrative Assistant II**

Monique Taylor provides administrative support for the office of Student & Diversity Services and is the first point of contact for Diversity Services. Please contact Monique for questions and information specifically regarding Diversity Services programs, as well as general questions and information regarding Commencement, student organizations, scholarships and programming for Student & Diversity Services.

### **Jasmyn Rubio**

#### **Administrative Assistant II**

Jasmyn Rubio provides administrative support to the office and is the first point of contact for disability services and students requesting testing and classroom accommodations. If you have any questions regarding accommodations and programming for Student & Diversity Services, don't hesitate to contact her.

## **Contact Information**

350 Cedar Street, First Floor  
Telephone (619) 515-1579; Fax (619) 615-1448  
[studentservices@cwsf.edu](mailto:studentservices@cwsf.edu) or [diversity@cwsf.edu](mailto:diversity@cwsf.edu)

## CWSL Key Contacts for Student Organizations

❖ **Alumni Engagement**

350 Building, Second Floor  
Lori Boyle – Director of Alumni Engagement  
(619) 515-1543  
[LBoyle@cwsl.edu](mailto:LBoyle@cwsl.edu)

❖ **Audio Visual Department**

350 Building, Third Floor  
(619) 525-1454  
[EdTech@cwsl.edu](mailto:EdTech@cwsl.edu)

❖ **Business Office**

225 Administration Building, First Floor  
John Virissimo Jr. – Senior Accountant II  
(619) 515- 1572  
[jiv@cwsl.edu](mailto:jiv@cwsl.edu)

❖ **Career and Professional Development Office**

350 Building, Second Floor  
(619) 525-7089  
Jocelyn Salvatori – Assistant Director  
[JSalvatori@cwsl.edu](mailto:JSalvatori@cwsl.edu)

❖ **Computer Lab**

290 Library Building  
Daniel Starnes – Computer Lab Support Technician  
(619) 525-1473  
[DStarnes@cwsl.edu](mailto:DStarnes@cwsl.edu)

❖ **Development Office**

225 Administration Building, Second Floor  
Brian Daly – Director of Development & Institutional Advancement  
(619) 515-1547  
[BDaly@cwsl.edu](mailto:BDaly@cwsl.edu)

❖ **Facilities Management**

350 Building, Mezzanine Floor  
Jolie Cartier – Executive Director for Facilities Management  
(619) 525-1487  
[Facilities@cwsl.edu](mailto:Facilities@cwsl.edu)

❖ **Institutional Advancement / Marketing & Communications**

225 Administration Building, Second Floor  
David Crowell – Project Manager  
(619) 515-1540  
[drc@cwsl.edu](mailto:drc@cwsl.edu)

❖ **Student & Diversity Services**

350 Cedar Street, First Floor  
Monique Taylor – Administrative Assistant for Student & Diversity Services  
(619) 515-1579  
[StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu)

## Frequently Asked Questions

### 1. How do I book a room for an event (meeting, speaker panel, tabling, etc.)?

- 1) First complete a [Student Organization Event Approval Form](#). Forms are located on the SBA website at <http://cwslsba.org/>.
- 2) Next, you will receive an event approval confirmation from Student & Diversity Services. Please note that there is up to a **48-hour reply time**.
- 3) Lastly, you will receive a room confirmation from Rooms. Please note that there is up to a **48-hour reply time**.

### 2. I want to advertise an event/meeting, what should I do?

- a) Events will be added to the [CWSL online calendar](#) by Student & Diversity Services once the event and room booking have been confirmed.
- b) Student organizations may put up a poster(s) in the First Floor lobby and on the SBA bulletin board (2<sup>nd</sup> Floor) of the 350 Building. Student organizations **must** get advanced, written approval from Student & Diversity Services in order to display posters.

Posters may not contain prohibited content such as: guns, images or references to alcohol, profanity, etc. Please review the [Posting of Notices and Announcements](#) policy.

- c) Approved posters may be submitted to [studentservices@cwsl.edu](mailto:studentservices@cwsl.edu) for inclusion in the Weekly Events slides on the monitor in the first floor lobby of the 350 building. Submissions must be received by 2:00 p.m. the Friday before.

### 3. We would like to serve alcohol at our event, what is the policy?

All student events where alcohol will be served (on and off campus) must be pre-approved by the Assistant Dean for Student & Diversity Services as part of the Event Approval process.

Before requesting approval, read the CWSL Alcohol Policy (pages 11-13) in the [Room Booking Policy](#). If the event is on-campus then the event host **must** hire a company for bartending services with a valid permit to serve alcohol at the event. A copy of the company's vendor license and insurance policy must be submitted to the Student & Diversity Services office with the Event Approval Form.

For off-campus events, the event location will dictate if licenses or insurance are required.

- For all events, event hosts are encouraged to prevent intoxication by:
  - Providing for a sufficient amount of alternative, non-alcoholic beverages;
  - Providing a sufficient amount of substantial, wholesome food; and
  - No self-service of alcohol.
  - Event hosts are legally responsible to insure CWSL policies and all applicable laws are complied with.

#### **4. How do I get involved with the SBA?**

- a) Run for an office during General Elections in the spring trimester.
- b) Join one of the committees such as Barrister's Ball Committee, Food Truck, or Community Outreach Committee.
- c) Attend a SBA meeting, which is open to the public.

Contact the SBA President for more information about becoming involved at [SBApres@law.cwsl.edu](mailto:SBApres@law.cwsl.edu).

#### **5. How do I start a new student organization?**

The new student organization must maintain a legal purpose, fulfill the mission of California Western School of Law and address the needs and desires of the current student body.

The first step in creating a new student organization is to meet with the Assistant Dean for Student & Diversity services to discuss and evaluate the proposed organization.

[Click here](#) for complete details.

## Appendix A

# FUNDRAISING POLICY AND PROCEDURES FOR STUDENT ORGANIZATIONS (8/2015)

## 1. General Policies

- 1.1. These policies apply whenever students individually or as student organizations seek to raise funds as charitable donations under the non-profit status of CWSL.
- 1.2. All fundraising activities except bake or food sales must be approved by the Assistant Dean for Student & Diversity Services and the Development Department at least three (3) months in advance of the fundraiser. Requests submitted less than three (3) months in advance may not be approved.
- 1.3. All Student Organizations are encouraged to meet with the Development Department once the event is approved to discuss the fundraising strategy.
- 1.4. Fundraiser materials (emails, flyers, letters, etc.) must be submitted to the Development Department at least two (2) months prior to the fundraiser. All such materials must be approved by the Development Department prior to use.
- 1.5. Student organizations may not purchase goods (other than bake-sale items) in order to resell for a profit or to raise funds for any activities (e.g. a student organization may not purchase t-shirts with their organization's logo in order to resell for a profit). However, Student Organizations may purchase branded t-shirts from their dues accounts as giveaways for PR purposes or under section 4.3 below.
- 1.6. All California Western policies apply to students fundraising events and activities (e.g. room booking, Business Office, etc.).
- 1.7. All Student Organizations are strongly encouraged to select a CWSL fund or program for their fundraiser beneficiary.

## 2. Fundraising Policies for CWSL (Internal) Programs and Funds

- 2.1. Once the event is concluded, the student organization must submit all monies raised – along with backup documentation including donor's name, gift amount, and gift designation – to the Development Department for processing no later than one week after the date of the event.
- 2.2. **All** checks must be made payable to "California Western School of Law" with the program or fund name listed in the check's memo line.
- 2.3. The Development Department will provide charitable tax acknowledgements to the donors directly for their donation, where appropriate.

## 3. Fundraising Policies for External Organizations and Charities

- 3.1. The external benefitting charity or organization must be selected at least two (2) months in advance of the fundraising event. The student organization is responsible for selecting the charity and notifying the charity of their selection.
- 3.2. Donations supporting the external organization or charity must be in the form of check or cash. Credit or debit cards or on-line donation tools are not allowed. Donations made by check must be made payable to the external organization or charity.
- 3.3. All forms of payment must be collected by the student organization.
- 3.4. Cash donations must be submitted to the Business Office, along with a check requisition form, in order for a check to be cut to the charity.
- 3.5. The student organization must deliver all donations to the charity and should provide them with a list of the donors (donor name and donation amount) so that the charity or organization may acknowledge the donors directly.
- 3.6. Since California Western is not directly benefiting from the monies raised, California Western does not provide charitable tax acknowledgements to donors.

#### **4. Types of Fundraisers – Specific Procedures**

##### **4.1. Auctions**

- 4.1.1. Prior to the auction event, the student organization must create a spreadsheet of donated auction items including donor's name and contact information, auction item name, item description, and fair market value of item (donor must determine this value and independent support must be provided to the Business Office). At least two weeks prior to the auction, the student organization must schedule an audit of the auction items with the Business Office. This audit must be performed after all auction items have been received and entered into the spreadsheet. The final spreadsheet must be submitted to the Business Office at least 2 days prior to the auction for use in auditing the auction items.
- 4.1.2. After the auction, the student organization must update the auction spreadsheet to include the auction item purchaser's information, purchaser's name and contact information, and auction item purchase price to the spreadsheet. An approved auction template is available from the Development Department. The completed spreadsheet must be submitted to the Business Office no later than 10 **business days** after the auction.
- 4.1.3. The only student organizations authorized to conduct auctions are the Student Body Association (SBA) and Public Interest Law Foundation (PILF).
- 4.1.4. New auctions will be approved at the discretion of the Assistant Dean of Student & Diversity Services and the Director of Development. Student

Organizations seeking to hold a new auction should seek approval at least six (6) months in advance of the event.

#### 4.2. Food/Bake Sales

- 4.2.1. Bake sales and food sales, whether products are homemade or store-bought, and whether or not they are being sold in conjunction with non-food products, are considered food sales. See CWSL Room Booking Policy.
- 4.2.2. No more than two (2) food sales are permitted per week, and they cannot be held on the same day or on a day when the Dean hosts a social event with food, such as “Coffee with the Dean.”
- 4.2.3. Food sales are only permitted on the first-floor lobby at 350 Cedar Street; they may not be held on the second floor.
- 4.2.4. Per San Diego County Health Codes, only certain foods are allowed at Food Sales or any student organization tabling. Allowed foods are as follows:
  - Pre-packaged foods like chips, cookies, granola bars, pretzels, crackers, candy, bottled or canned waters or soft drinks.
  - Homemade baked goods like cookies, brownies, cupcakes.
  - Food delivered to CWSL from restaurants, delicatessens, and/or grocery stores, like pizza, Einstein bagels, Rubio’s, etc.
  - Food prepared or served by licensed caterers like Donna Blain Coffee, Bettina’s Custom Catering, etc.

The following foods are NOT allowed:

- Food that must be kept warm to be safe like cooked meats, casseroles, hot side dishes, nachos, chili, hamburgers, etc.
- Food that must be stored and displayed refrigerated like custards, mayonnaise-based foods, deli plates, cheese or meat sandwiches, hamburgers, hot dogs, barbeque pork or chicken, macaroni salad, ice cream, salads, sandwiches, etc.

#### 4.3. **Direct Donations to Student Organizations with Thank-You Gift Items (PBS Model)**

- 4.3.1. Student Organizations may provide a “thank you” gift for a donors cash donation if the following policies are followed:
  - 4.3.1.1. The fundraising campaign including the specific gifts to be provided to donors along with all promotional materials (see 4.3.3.1 below) must be approved by the Assistant Dean of Students & Diversity Services and the Development Department at least three (3) months in advance. Requests submitted less than three (3) months in advance may not be approved.
  - 4.3.1.2. The fair market value of the thank-you gifts must be determined by the Development Department in collaboration with the student organization, and approved by the Business Office.



- 4.3.1.3. All fundraising solicitations and/or promotional materials must include the following language: "Your donation is tax-deductible less the fair market value of any goods or services received." If a specific donation receives a specific item or good in return (e.g. if a donor donates \$25 they will receive a t-shirt as a thank-you for their contribution), the donor will only receive a charitable deduction of their donation less the fair market value of the thank-you gift.
- 4.3.1.4. Thank You gifts are delivered to the donor at least 48 hours after the receipt of the donation.
- 4.3.2. Once the donation period is concluded, the student organization must submit the following information to the Development Department within seven business days:
- Total donation amount
  - Fair market value of the thank-you gift
  - Tax- deductible amount (total donation amount less the fair market value of the thank-you gift)
- 4.3.3. The Development Department will provide charitable tax acknowledgements to the donors directly for their donation, where appropriate.

## Appendix B

# MANDATORY CONTINUING LEGAL EDUCATION CREDITS (MCLE)

Events which qualify for California Mandatory Continuing Legal Education (MCLE) credits must comply with the [State Bar rules](#) (rule 3.601) and be coordinated through David Crowell ([dcrowell@cwsl.edu](mailto:dcrowell@cwsl.edu)) in Institutional Advancement.

For examples of activities that do and do not qualify for MCLE credit [click here](#).

Due to the requirements for State Bar approval, planning should begin at least six months before event date.

### PROCEDURE FOR SCHEDULING MCLE EVENT

1. Review [MCLE rule](#).
2. Request the CLE Activity Request Form far enough in advance of the event that you will be able to return the completed form and the following items to David Crowell at least 3 business days prior to the event date.

Items to submit:

- a. Speaker Roster including their titles, Bios (abridged), and their qualifications (concise) to present CLE on the subject area;
  - b. Detailed Agenda of the presentation / panel discussion(s);
  - c. Copy of the advertisement / flyer; and
  - d. Copies of the Substantive Written Materials.
    - Required if your activity is longer than 60 minutes.
    - Materials should augment the class discussion with citations to legal authorities (statutes, case law) so that attendees have useful information that they can reference if they want to learn more.
3. After the event submit the following items to David Crowell:
    - a. Completed record of attendance (originals with printed names, bar numbers and signatures) which the law school must retain for four (4) years; and
    - b. Completed Activity Evaluations (names optional) which the law school must retain for one (1) year.

## TIPS ON PRESENTING AN MCLE EVENT

Helpful planning suggestions to consider *before* scheduling an MCLE event:

1. Define the objectives. What will the participant learn and be able to do at the conclusion of the course?
  - a. Clearly state the goals and learning objectives for the course.
  - b. Determine how the program will change or enhance the attorney's attitude, knowledge, and skill at the conclusion of the course.
  - c. Develop a framework for selecting the learning materials, content, and method of delivering the program (live, online, lecture, interactive, etc.).
  - d. Provide an accurate description of the course.
2. If the program is intended for MCLE credit, the subject matter must be addressed specially to the attorneys.
3. Provide substantive written materials when the activity is more than one (1) hour in its presentation.
4. Define your audience. If your topic is based on a subject that can easily be converted or presented to any other group of professionals, and is not limited to attorneys and the legal education field, it may not be acceptable for MCLE credit. Examples of unacceptable topics may include:
  - a. Laws of Nature
  - b. Paralegal Courses and Annual Paralegal Retreats
  - c. Basic Computer Training
  - d. How to Make Your Website a Rainmaker
  - e. Quality of Life – Work Balance and Transitioning Away from the Practice of Law
  - f. Marketing or Advertising of Services to Gain New Clients (topics in which the primary focus is generating new business)
  - g. Topics to increase income for the firm or attorney's gain/profit; rainmaking to develop new clients; and building a niche practice or business.
  - h. Motivating employees
  - i. Stress management, and meditation/yoga retreats

## Appendix C

# STUDENT ORGANIZATION EVENT APPROVAL FORM

**THIS FORM IS REQUIRED FOR ALL EVENTS**

Please note that the approval process may take up to 48-hours.

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Organization Name:  [select from drop down list]

### TYPE OF EVENT

- CONFERENCE/SYMPOSIUM (start 6 months prior)
- FUNDRAISING (Bake Sales)
- FUNDRAISING (Non-Bake Sales: Auctions, Luau, etc.)  
\*Start 6 months prior
- GENERAL MEETING
- MOVIE SCREENING  
\*Please note that written permission is required from the licensing agent unless the film is in the public domain.
- NETWORKING/MIXER  
\*Please note that a certificate of insurance is required if this event is on campus and you are serving alcohol.
- PHILANTHROPY (Community Services)
- PHILANTHROPY (Donation Bins)
- SPEAKER(S)/PANEL DISCUSSIONS
- TABLING (Event Info/Sign Ups/Ticket Sales)
- OTHER

### EVENT INFORMATION

Name of Event:

Proposed Date of Event:

Proposed Time of Event (start & end):

Detailed description of the event, including its business purpose:

Anticipated Attendance:

Event Budget:

Contact Person Name:

Contact Person Email:  (valid email required)

Contact Person Position:

<span>One%20	<span>Please%2	<span>Please%2	yyy	nn
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## Appendix D

# EVENT PLANNING CHECKLIST

### Audio-Visual/Technology

- Request sent to [EdTech@cwsu.edu](mailto:EdTech@cwsu.edu)
- Computer
- Printer
- Laptop access
- Internet access
- Software installation
- Staff assistance
- Photographer
- OH projection/screen
- LCD projector
- Microphone / PA system
- Podium: floor/tabletop
- Whiteboard w/ pens
- Flipchart w/ markers
- Request for Wi-Fi access
- Permissions obtained for recording
- Recording # of copies \_\_\_\_\_

### Catering

- Caterer confirmed: \_\_\_\_\_
- Menu confirmed: \_\_\_\_\_
- Beverages: \_\_\_\_\_

### Decorations

- Centerpieces
- Balloons

### Entertainment

- Musicians: \_\_\_\_\_
- Contract / Deposit sent \_\_\_\_\_

### Flyers

- Posted / distributed / mailed
- Obtain CWSL logo from Marketing and Communications
- Reminder emails to targeted group(s) of campus community
- Add to public-facing [calendar](#)

### Gifts/Awards/Mementos

- \_\_\_\_\_
- Date ordered: \_\_\_\_\_ Qty: \_\_\_\_\_
- Received

### Invitations

- Save-the-dated mailed: \_\_\_\_\_
- Invitations selected
  - printed: \_\_\_\_\_
  - mailed: \_\_\_\_\_
  - reminders sent: \_\_\_\_\_
- Letters mailed: \_\_\_\_\_

### Maintenance

- Request form submitted
- Staff assistance requested
- Linens / tables ordered

### Security

- Notification email sent
- Inquire w/ VIP if they travel w/ personal security who may be armed, and advise Facilities Director if armed
- Walkie talkie radios ordered, as needed

### Setup

- Cocktail reception
- Buffet
- Sit-down
- Registration table / chairs
- Wastebasket

### Signage

- Copy to printer: \_\_\_\_\_
- Received: \_\_\_\_\_

### Site Info

- Site selected: \_\_\_\_\_
- Onsite (CWSL) room booked: \_\_\_\_\_
- Offsite contract signed / sent: \_\_\_\_\_
- Offsite deposit sent: \_\_\_\_\_

### Speaker(s): \_\_\_\_\_

- Received bio / pic
- Confirm travel plans
- Hotel booked: \_\_\_\_\_

### Misc

- Nametags
- Registration packets
- CWSL purple banner
- Printed materials / handouts
- Attendee / RSVP lists
- Office supplies
- Camera / Digital camera
- Cash box receipt book
- Drink tickets
- Event file

### Post-Event

- Catering / rental / floral invoices received
- Check requests submitted
- Evaluation delivered
- Completed evaluation received

## Appendix E

# BACKWARD TIMELINE CHECKLIST

### **No fewer than 4 Weeks Ahead**

**[Note: during some times of the year this may be 4 – 8 weeks ahead]**

- Research and visit potential venues/rooms
- Check the [online, internal Events Viewer](#) and the public-facing [Calendar](#) to understand other events occurring on campus around or concurrent to your event.
- Get cost estimates (site/room rental, catering, AV/lights, etc.)
- Get bids for other major items
- Determine initial budget
- Compile mailing list (individuals/businesses)
- Check proposed date for potential conflicts, finalize date in writing
- Get written contracts for site, entertainment etc.
- Develop alternative site (if event is outdoors)
- Invite/confirm VIPs
- Inform Marketing and Communications
- Set marketing schedule
- Investigate need for special permits, licenses, insurance, etc.
- Complete mailing lists for invitations

### **No fewer than 3 - 4 Weeks Ahead**

- Send out invitations
- Set menu with caterer for food and beverage
- Secure permits and/or insurance
- Finalize audio/visual contract
- Order walkie talkie radios from Facilities (if needed, if budgeted)

### **At least 2 Weeks Ahead**

- Obtain contracts for rental items
- Hold walk-through of event with responsible committees, chairpersons and responsible site staff members at event site
- Check with VIP if they travel with personal security who may be armed, and if armed, advise the Facilities Director
- Review/finalize budget, task sheets and tentative timeline
- Start phone follow-up for guests
- Create check requests for payments to be made for the day of the event

### **1 Week Ahead**

- Confirm staff for registration
- Get enlarged site plan/room diagram, assign seats/tables
- Give estimate of guests expected to caterer/food service
- Meet with all outside vendors, consultants to coordinate event
- Give caterer revised numbers
- Meet with key staff to finalize any of the above

### **1 Day Before**

- Confirm number attending
- Create name tags (as needed)
- Finish seating/table arrangements
- Distribute seating chart, assignments to hosts/hostesses

- Schedule pickup or delivery of any rented or loaned equipment
- Double-check arrival time and delivery times with vendors
- Reconfirm event site, hotel, transportation
- Deliver final scripts/ timelines to all program participants
- Finalize catering guarantee, refreshments
- Final walk-through with all personnel
- Establish amount of petty cash needed for tips and emergencies
- Recheck all equipment and supplies to be brought to the event
- Have petty cash and vendor checks prepared, if needed
- Inform Campus Security if media will attend

***Event Day***

- Be sure all VIPs are in place and have scripts/speaking points
- Go over all the final details with caterer and setup staff
- Check with volunteers to make sure all tasks are covered
- Setup registration area
- Check sound/light equipment and staging before rehearsal



## Appendix F

### SAMPLE TASK ASSIGNMENT LIST

<i>Event Title &amp; Date:</i>		
<b>Logistics</b>	Staff Assignment	Completion Date
Prepare projected event budget and submit for approvals		
Determine catering needs & place order(s)		
Catering, rentals, lighting, AV site visits		
Reserve equipment		
Finalize menu selections		
Finalize catering order numbers		
Order any gifts for speaker and/or attendees		
Check with photographer for availability		
Secure volunteers and/or student ambassadors		
<b>Program &amp; Speaker(s)</b>	Staff Assignment	Completion Date
Finalize speakers for event		
Contact speaker to discuss event – equipment needs, style of lecture, etc.		
Send draft scenario with suggested bullet points and send to VIPs for review		
Contact VIP offices to work on desired speaking points – they may request assistance with content		
Send final scenario and guest list to relevant volunteers and staff		
Submit final event scenario, current guest list, table seating assignments and seating diagram to VIPs		
Finalize presentation and load presentation on laptop/flash drive		
Send any updates to relevant volunteers and staff		
<b>Printed Materials &amp; Mailings</b>	Staff Assignment	Completion Date
Determine # of projected guests, invite groups and any research requests that may be necessary to create guest list		
Create invitation lists – contact VIP offices for any additional invitees they would like to include		
Create invitations and send to appropriate staff for review and approval		
Obtain a quote from printing company		
Finalize invite lists		
Send invitations to printer		
Stuff invitations, seal and stamp		
Send out invitations		
Update RSVP list and cross reference name spellings with invite list		
E-mail or call those invitees who have not responded		

Submit Guest list, final table guests with bio information and seating diagram to VIP's		
Copy handouts		
Finalize guest list and send to VIPs for review		
Prepare packets		
Finalize seating chart		
Send reminder email to attendees/call RSVP list		
Handle any last minute RSVPs		
Inform Security of number/type of guests and attendees, including media		
<b>Day-of Logistics</b>	<b>Staff Assignment</b>	<b>Completion Date</b>
<b>Supplies &amp; Materials</b>		
Reserved signs		
Talking points		
Guest List - Alphabetical by last name and another list by table #		
Table diagram		
Event scenario		
Nametags		
Programs		
Staffing flow		
Event supplies		
Backup computer		
Presentation		
Foam trays for nametags		
Gift/Favors		
<b>Event Flow</b>		
On-site Management - catering, AV, rentals, etc.		
Registration & guest Relations		
Program & speakers		
Clean-up		

## Appendix G

# POSTING OF NOTICES AND ANNOUNCEMENTS

Updated: August 2014

The purpose of this policy is to: (1) assist the campus community in communicating news consistently via notices and announcements, (2) prevent damage to walls and surfaces of the facilities, and (3) maintain an aesthetically pleasing environment for faculty, staff, students and guests.

This Policy applies to all interior and exterior walls and surfaces at California Western School of Law in all campus buildings.

### 1. Approved notices

#### i. **Using Tape**

Notices may only be affixed to vertical surfaces using low-to-medium-adhesion rated painter's grade masking tape (commonly referred to as "blue tape", or "painter's tape"). These tapes are typically blue or green colored.

**Other tapes such as adhesive tape (commonly referred to as "Scotch tape"), packing tape, or masking tape are not permitted.**

#### ii. **Easels and Lobby Notices**

Notices to be posted in the 350 Cedar Street 1<sup>st</sup> and 2<sup>nd</sup> floor lobbies may be posted on easels, only. Easels are available in the Facilities Management office on the Mezzanine, and are on a first-come, first-served basis with limited availability.

Posted notices on easels for the 1<sup>st</sup> floor must be pre-approved by the Student Services department; notices on the 2<sup>nd</sup> floor do not need a pre-approval.

#### iii. **Bulletin and Notice Boards**

Bulletin/notice boards are assigned as noted in the below chart.

Building/Location	Purpose	Restriction: Notices can only be posted by...
<b>350 Cedar Street</b>		
Lower level Student Lounge, north wall	Any notice permitted	Students
Lower level Student Org. suite, east wall	Any notice permitted	Students
Lower level hallway at Student Org. door	Any notice permitted	Students
2 <sup>nd</sup> floor by patio, south wall	All student organization notices	Students
2 <sup>nd</sup> floor, east hallway	Moot Court Honors Board Notices	Moot Court Honors Board

iv. **Brochures, Handouts**

Brochures and handouts for mission-related information from departments and clinics may be distributed only via controlled procedures such as dedicated displays, inserts into student presentation folders, or handouts in class.

2. **Communication Methods**

i. **Announcements**

Posters announcing campus events should indicate:

- the name of the sponsoring organization or group,
- the nature of the event,
- the date and time,
- the location,
- the cost (if any), and
- a contact number for more information.

3. **Unapproved Notices**

i. **Posting**

Notices, banners, signs or announcements may not be posted by any means on any vertical or horizontal surface including walls, wood surfaces, classroom chalk and wipe boards, lockers, windows, doors, restroom stalls, tables, chairs, hanging from ceilings, or any area other than designated notice boards as listed in the chart, unless pre-approved by Student & Diversity Services.

No notices, banners, signs or announcements are permitted to be hung by any type of line, string, or cable, without the advanced approval of the Facilities Management department.

ii. **Mention of Alcohol**

At no time shall announcements, notices, or signs reference the service of alcohol (ex. "wine and cheese party"). For details, please see the campus *Room Booking Policy, Use Policies*.

iii. **Flyers**

Mass-produced flyers are prohibited from distribution in classrooms and campus common areas.

iv. **Chalking**

No chalking is permitted on walkways, walls, or anywhere on CWSL property or facilities.

## Appendix H

# SOCIAL MEDIA GUIDELINES FOR STUDENT ORGANIZATIONS

### California Western School of Law Social Media Guidelines for Student Organizations

Approved by Cabinet: January 28, 2014

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#### Purpose of Guidelines

The purpose of this document is to provide appropriate best practices for California Western student organizations with social media channels in order to maintain a professional online presence for the law school and to protect the reputation of the law school.

Individuals posting on behalf of the law school and/or a student organization are expected to adhere to the policies and best practices included in this document and appendices, including:

- Notify the law school: Send your social media URL/handle to the Director of Marketing and Communications, at [SocialMedia@cwsl.edu](mailto:SocialMedia@cwsl.edu).
- Each social media account must have at least one responsible administrator assigned. Those who leave the law school should immediately have their user/administrator credentials revoked.
- Before opening an official CWSL organization social media account, a plan should be developed that includes the account's audiences and goals; as well as a strategy for keeping information on the site(s) up-to-date.
- Logins and passwords for each social media account should be kept on file by the organization administering the account.
- Students identified as administrators of accounts are trusted to manage and monitor content of their officially recognized accounts. Administrators are responsible to remove content that may violate law school policies.
- Accounts must include a disclaimer statement regarding posted content and opinions contained on the site.
- Inappropriate, offensive, injurious, and illegal content shall not be posted to organizational social media accounts. Violations of these guidelines will be referred to the Vice Dean for Academic Affairs for resolution.
- Best practices for social media, as outlined in Appendix 1 of this document, should be followed.

#### Scope of Policy

This policy covers all school-sanctioned student clubs and organizations at California Western School of Law.

### What forums are covered?

This policy applies to all official social media presences for California Western student organizations including, but not limited to:

- Facebook
- YouTube
- Twitter
- Instagram
- LinkedIn
- Blogs
- Podcasts

### Social Media Guidelines

All members of the law school community are trusted to respect and protect the image and reputation of the institution as they participate in social media channels as representatives of the school.

- Protect confidential and proprietary information: Do not post confidential or proprietary information about California Western School of Law, its students, faculty, staff, administrators, or alumni.
- Respect copyright and fair use: **Do not use material from any other source without permission.** See Appendix I, "Using Images Created by Others."
- Do not use California Western logos or resources for endorsements: Do not use the law school's name or resources to promote a product, cause, or political party or candidate.
- Do not use the California Western nameplate, seal, or any other law school images or iconography on personal social media sites.
- Abide by policies and procedures: California Western does not monitor personal websites but will address issues that violate related and established policies and procedures.
- Terms of service: Obey the Terms of Service of any social media platform employed.

When posting, acknowledge who you are: If you are representing California Western when posting on a social media platform, acknowledge this. If you are expressing your own personal opinions, state this as well.

Protect the institutional voice: Posts on social media sites should reflect the law school's mission and values by remaining professional in tone and in good taste.

## Appendix 1 (Social Media Best Practices)

**Practical Application of the Policy:** This section applies to those posting on behalf of the law school, a program or department, though the guidelines may be helpful for anyone posting on social media in any capacity.

- *Consider how best to identify yourself:* Program or department social media channels should be clearly labeled as such, so as not to be confused with the law school's main social media channels. The Director of Marketing and Communications is available to assist with naming, photos, or icons.
- *Think twice before posting:* Posts can become widely known. Think through how your choice of words reflects on you and the law school. Search engines can turn up posts years after they are created and deleted, and comments can be forwarded or copied. If you wouldn't say it publicly, consider whether you should post it online.
- *Be accurate:* Verify facts before posting them on social media or online. Review content for grammatical and spelling errors if posting on behalf of the law school in any capacity.
- *Be respectful:* Understand that content contributed to a social media site could encourage comments or discussion of opposing ideas. Responses should be considered carefully in light of how they would reflect on the poster and/or the law school and its institutional voice.
- *Use discretion:* Refrain from reporting, speculating, discussing, or giving any opinions on law school topics or personalities that could be considered sensitive, confidential, or disparaging.
- *Remember your audience:* Be aware that a presence in the social media world is available to the public at large including internal audiences, prospective students, peer institutions, and colleagues. Ensure the post will not alienate, harm, or provoke any groups or individuals.
- *On personal sites, identify your views as your own.* If you identify yourself as a member of the California Western faculty or staff online, it should be clear that the views expressed are *not* those of the institution. If you have information and news that you would like to announce to the public or media, please contact the Director of Marketing and Communications.

## Appendix I



### USING IMAGES CREATED BY OTHERS (rev. 7/15)

As a general rule, you may not use graphic images found on the Internet in your own work even if the image does not say it is copyrighted.

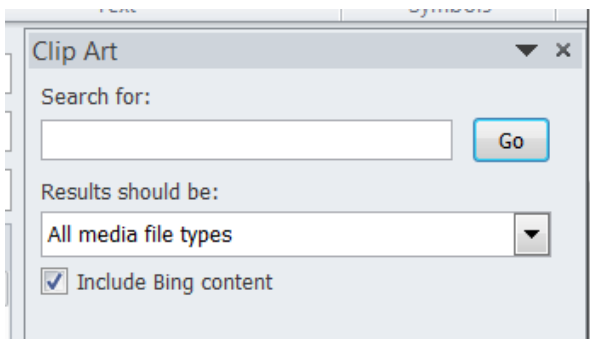
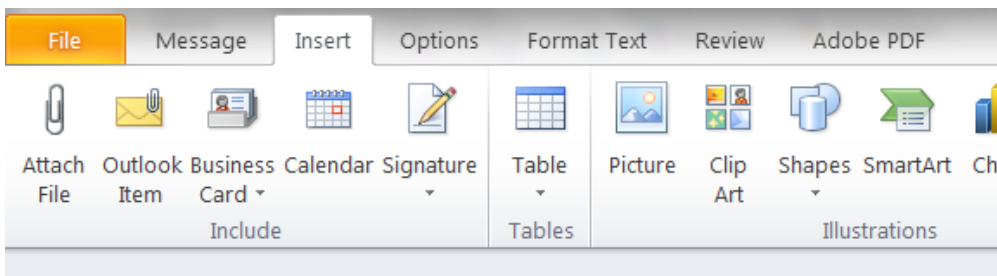
Exceptions:

1. Image says it is in the public domain.
2. Source of the image clearly states that image may be used by others.

#### Where can you get images to use without violating copyright law?

##### A. Microsoft Office clip art

Up until 2015, your Microsoft Office license allowed you to use anything in the Microsoft clip art file. Beginning in 2015, Microsoft phased out its clip art files, instead, its clip art function directs users to Bing images.



Microsoft indicates that its Bing Image Search uses a copyright filter based on the Creative Commons licensing system retrieving only images that have been tagged with Creative Commons licenses. Unfortunately, Creative Commons licensing does not mean that an image is copyright free – it just means that you may use the image if you follow rules for the Creative Commons license for the image.

If you do the search including Bing content, the images you bring up may or may not have a link to the source of the image. You should follow the link to the source and review the applicable



license to determine whether your use will comply with the license. If you are using the image non-commercially, in most cases you will be able to use the image as long as you give attribution. Unfortunately, there has been some Internet discussion that there are missing and broken links on the images retrieved, so the system is less than perfect. The images you find using this approach should be fine for internal uses, such as an email, internal presentations, and temporary non-digital posters, but should not be used for items which may find their way on to our web site as digital files. (These items can be retrieved by searching and could lead to infringement actions.)

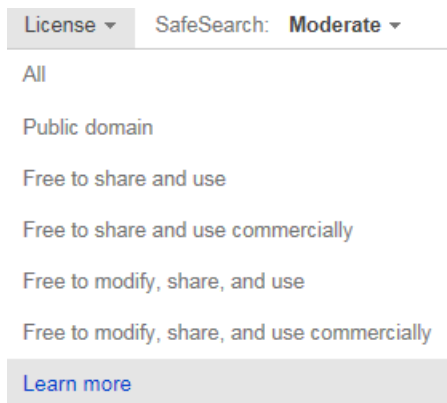
## Bing.com

Instead of getting Bing clip art through Microsoft applications, you can go directly to Bing.com to recover images that Bing says are either in the public domain or under Creative Commons licenses. There is some disagreement over Bing's diligence in determining the licensing of images, but you are probably safe with using the images, particularly if you give attribution.

1. Go to Bing.com.
2. Click **Images** at top of page.
3. In the search box type what you are looking for. If you specifically want clip art, type "clip art" as part of your search. For example:



4. Enter.
5. Click on License drop down menu.



6. The safest license is "Public Domain"; the largest subset is "Free to share and use".



7. If you hover your cursor over the image, it may indicate a source. If it does, give attribution to Bing.com, with the source.



600 x 600 • jpeg • freestock.ca

Attribution on your use: Bing.com: freestock.ca

If there is no attribution on the image, the attribution on your use would be Bing.com.

Caveat: the images under the public domain licenses included some images with popular cartoon characters such as Snoopy and Mickie Mouse. Since I am highly skeptical that these are actually in the public domain, I would suggest you refrain from using these.

## B. Public domain sources:

- a) [www.pdclipart.org](http://www.pdclipart.org)



- b) [www.openclipart.org](http://www.openclipart.org)



- c) <http://classroomclipart.com/clipart/Clipart/Legal.htm>



- d) <http://www.dreamstime.com/>

Download Royalty-Free stock photos, illustrations & images for as low as \$0.20 / image or free. DREAMSTIME offers both free and royalty free (slight cost) images. You need to sign up for the free service and make sure that you follow the tabs to the free images section.

## “License: Royalty- Free License of use of Non-Watermarked Images and Restrictions”

The high-resolution images that you download under the regular Royalty Free (RF) license may be used to make fine art prints, on a web site, in a magazine, newspaper, book or booklet, book cover, flyer, application software (apps) or any other advertising and promotional material, in either printed or electronic media, as long as the item in which the image appears does not contradict any of the restrictions below....

[Excluded uses]: Web templates, greeting cards or postcards especially designed for sale, similar print-on-demand services, canvas, t-shirts, mugs, calendars, postcards, mouse pads or any other items incorporating the image in an essential manner, intended to be sold are considered redistribution (if the image is used in an essential manner)....

Buying the high-resolution image (purchasing the license) does not transfer the copyright. You may not claim that the image is your own and you may not sell, license for use, or in any way distribute the image for reuse. We recommend that you credit the agency and the photographer when you use an image. By this you benefit the community at Dreamstime.com, of which you are an integral part, and help increase your success as part of the community, which, by growing contributions, gains quantity and quality.”

There is one additional restriction for images from the “free” section of the service: the maximum amount of copies is limited to 10,000 copies.

- e) [http://commons.wikimedia.org/wiki/Main\\_Page](http://commons.wikimedia.org/wiki/Main_Page)

Wikimedia Commons a database of over 16,000,000 freely usable media files. It's a rather dense databases, but includes a great many images (and sounds and videos) and it tells you why each particular image is in the public domain.

### **If you can't find a public domain graphic image that meets your needs:**

1. Get permission or a license. If you find a graphic you'd like to use, contact whoever holds the copyright to the graphic to ask for permission. They may be happy to give permission (or license) its use, but they may want to charge a fee for the use.
  - a. The copyright holder may or may not be clear. BE AWARE that it is somewhat probable that it won't be the site where you found the graphic. The site may be using the image with permission or without permission.
  - b. If you get permission or a license to use an image, with or without payment, please get the permission IN WRITING AND FORWARD A COPY OF THE PERMISSION to Phyllis Marion so we have a record that permission has been granted.
2. Purchase an individual image. It is possible to purchase (for a relatively small fee) individual images that are royalty free from one of several sites that are in the business of selling stock images. The site may ask you to set up an account or a subscription. Possible sites include:

[www.Shutterstock.com](http://www.Shutterstock.com)  
<http://www.fotosearch.com/clip-art/law.html>

<http://us.fotolia.com/>  
<http://www.dreamstime.com/>

3. Purchase clip art software. If your department is a heavy user of graphics, there are several inexpensive clip art software packages available for purchase. Make sure to check with IT about whether the package is compatible with CWSL technology. Below is a site which reviews clip art packages. (It is only up to date through April 2011.) The site also has links to various sources of images that are royalty-free (but with a small fee for use).

<http://clip-art-review.toptenreviews.com/>

Phyllis Marion Rev. 7/30/15

## Appendix J

# STUDENT ORGANIZATION ADVANCE REQUEST ACKNOWLEDGEMENT FORM

Student Name: \_\_\_\_\_

Student Organization: \_\_\_\_\_

Reason for Advance: \_\_\_\_\_

Advance Amount Requested: \$\_\_\_\_\_

### **Terms of the Advance:**

Students who have been approved for an advance are required to submit original, detailed receipts as substantiation for all expenses incurred. The expense substantiation plus any unused cash must be returned to the Business Office within 14 business days of receiving the advance payment. Failure to submit the required documentation and/or return of any unused cash by the deadline may result in the following actions:

- Amount may be reported as compensation to the Internal Revenue Service (IRS) as compensation. **Please note:** amounts reported to the IRS as compensation may have a negative effect on any future requests for federal financial aid.
- Student may have a Business Office hold placed on account.
- Student Organization may be prohibited from further reimbursements during the trimester.
- Student Organization may be prohibited from seeking SBA funds the following trimester.
- In rare cases, and Honor Code violation may result.

I acknowledge that I have read and understand the terms of the advance detailed above.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
SBA Treasurer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Assistant Dean for Students & Diversity Services

\_\_\_\_\_  
Date

**Appendix K**

**STUDENT ORGANIZATION ADVANCE REQUEST REPORTING FORM**

<i>Business Office use only:</i>	Date received: _____	Vendor # _____
	Co. # _____	Sch.F? (circle one): Y / N

**CALIFORNIA WESTERN SCHOOL OF LAW STUDENT ORGANIZATION ADVANCE REPORTING**

STUDENT NAME: \_\_\_\_\_

ORGANIZATION: \_\_\_\_\_

Reimbursable Expenses Incurred	Account# xxxx	Dept # xxx	Project Code xxxx	Amount
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
			Sub-total	-
			Less: advance amount:	
			Total Amount Requested	\$ -

**Business Purpose (please be specific):** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*I certify that the above is a true statement of incurred expenses in accordance with CWSL policy.*

Student Signature \_\_\_\_\_

Authorized approval: \_\_\_\_\_

Date: \_\_\_\_\_

# Appendix L

## STUDENT ORGANIZATION REIMBURSEMENT FORM

Please submit completed form to the SBA Treasurer's folder in the Student Org Lounge, Cubicle #1.

Reimbursements under \$50.00 will be paid in cash; over \$50.00 will be paid in check.

If you have questions please contact [SBATreas@law.cwsl.edu](mailto:SBATreas@law.cwsl.edu).

1. Organization (Full Name): \_\_\_\_\_

2. Event Name: \_\_\_\_\_

3. Event Date: \_\_\_\_\_ 4. Number Attended (include roster): \_\_\_\_\_

5. Provide a brief explanation of the event, including its business purpose: \_\_\_\_\_  
\_\_\_\_\_

6. Total Amount Requested: \$\_\_\_\_\_ 7. Reimbursement from Dues Account Only?  Y  N

8. Payable To: \_\_\_\_\_ 9. Payee's email: \_\_\_\_\_  
(Legal Name)

10. Please include one of the following:  Original Itemized Receipt  Missing Receipt Form

11. Delivery Instructions:  Hold for Pickup  Mail To: \_\_\_\_\_  
\_\_\_\_\_

12. Request Authorized By (cannot be person getting reimbursed):

Name: \_\_\_\_\_ Position:  President  Treasurer

Signature: \_\_\_\_\_ Date Approved: \_\_\_\_\_

\*\*\*\*\* DO NOT WRITE BELOW THIS LINE \*\*\*\*\*

Pay funds from:  SBA Budget Amount: \$\_\_\_\_\_ Account Code: \_\_\_\_\_

SBA Budget Amount: \$\_\_\_\_\_ Account Code: \_\_\_\_\_

Dues Amount: \$\_\_\_\_\_

SBA Treasurer: _____	Date Approved: _____
Student Services – Received By : _____	Date Received: _____
Event Approved: _____	Date Approved: _____
Approved By: _____	Date Approved: _____
Business Office – Received By: _____	Date Approved: _____

**Appendix M**

**STUDENT ORGANIZATION VENDOR CHECK REQUEST FORM**

**\*\*THIS FORM SHOULD BE USED WHEN MAKING A DIRECT PAYMENT  
TO A SUPPLIER OF GOODS AND/OR SERVICES\*\***

Please submit completed form to the SBA Treasurer's folder in the Student Org Lounge, Cubicle #1.  
If you have questions please contact [SBATreas@law.cwsl.edu](mailto:SBATreas@law.cwsl.edu).

1. Today's Date: \_\_\_\_\_

2. Payable To: \_\_\_\_\_

3. Address: \_\_\_\_\_

4. Phone Number: \_\_\_\_\_ 5. Payee's Email: \_\_\_\_\_

6. New Payee?  YES (include W-9 form)  NO      7. Amount: \$\_\_\_\_\_

Include invoice

8. Pay funds from:  SBA Budget      Amount: \$\_\_\_\_\_      Account Code: \_\_\_\_\_

Dues Account      Amount: \$\_\_\_\_\_

9. Business Purpose: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

10. Delivery Instructions:     Hold for Pickup     Mail with invoice

11. Request Authorized By:

Name: \_\_\_\_\_      Position:  President     Treasurer

Organization (Full Name): \_\_\_\_\_

Signature: \_\_\_\_\_      E-mail: \_\_\_\_\_

\*\*\*\*\* DO NOT WRITE BELOW THIS LINE \*\*\*\*\*

SBA Treasurer: _____	Date Approved: _____
Student Services – Received By : _____	Date Received: _____
Event Approved:    YES / NO	Date Approved: _____
Approved By: _____	Date Approved: _____
Business Office – Received By: _____	Date Approved: _____



Appendix N

SAMPLE OF ITEMIZED RECEIPT

RECEIPT WITH PAYMENT

ITEMIZED RECEIPT

Beer Co  
602 Broadway  
San Diego, CA 92101  
619-398-0707

Beer Co  
602 Broadway  
San Diego, CA 92101  
619-398-0707

Server: Heather DOB: 10/24/2013  
07:03 PM 10/24/2013  
Table 100/2 2/20008

Server: Heather 10/24/2013  
Table 100/2 6:57 PM  
Guests: 24 20008  
Reprint #: 1

SALE

Visa #XXXXXXXXXXXX9830  
Magnetic card present  
Card Entry Method: S  
Approval: 050422

Guacamole & Chips 5.00  
Ahi Tower 7.00  
Mozzarella Sticks (2 @5.00) 10.00  
Pretzel Sticks (2 @5.00) 10.00  
Garlic Bread 4.95  
Pepperoni Pizza 5.50  
Endless Summer Veggie 5.50  
Chicken Nachos 6.00  
Chicken Lettuce Wraps 7.00  
Chicken Nachos NO Chicken 6.00

Amount: \$ 24.05

+ Included Gratuity: \$ 4.01

+ Additional Tip \$6.00

= Total: \$34.06

Subtotal 66.95  
Tax 5.19  
Total 72.14  
Gratuity 18.00% 12.05  
Total 84.19

I agree to pay the above total amount according to the card issuer agreement.

Balance Due 84.19

X

\*\*Guest Copy\*\*

\*\*\*\*\*  
Gratuity Calculator:  
20% = \$11.39  
15% = \$12.04  
HAPPY HOUR 7:00pm  
LATE NIGHT HAPPY HOUR Now close

TO RECEIVE REIMBURSEMENT – BOTH COPIES ARE NECESSARY.

## Appendix O

# STUDENT ORGANIZATION MISSING RECEIPT FORM

CALIFORNIA WESTERN SCHOOL OF LAW STUDENT ORGANIZATION MISSING RECEIPT FORM	
STUDENT NAME _____	ORGANIZATION _____
AMOUNT \$ _____	PAYEE/VENDOR _____
EVENT NAME _____	
<u>Business Purpose of event</u> (as described on Reimbursement Request Form): _____ _____ _____	
<i>I certify that the amount shown above is the amount I actually paid and that I will not submit a duplicative claim for this amount.</i>	
Student Signature _____	Date: _____
Authorized approval: _____ Assistant Dean for Student & Diversity Services	Date: _____
If you are missing any single receipt that is \$75.00 or greater, then you must also have approval by CWSL Chief Financial Officer.	
Authorized approval: _____ Chief Financial Officer	Date: _____

**Appendix P**

**STUDENT ORGANIZATION TRAVEL ADVANCE  
ACKNOWLEDGEMENT FORM**

Student Name: \_\_\_\_\_

Student Organization: \_\_\_\_\_

Reason for Advance: \_\_\_\_\_

Advance Amount: \$ \_\_\_\_\_

Terms of the Travel Advance:

Students who have been approved for travel advances are required to submit original, detailed receipts as substantiation for all expenses incurred. The expense substantiation plus any unused cash must be returned to the Business Office within two weeks of the date of the event. Failure to submit the required documentation and/or return of any unused cash in a timely manner (within two weeks of the date of the event) will result in the reporting of the amounts to the Internal Revenue Service as compensation.

By accepting this travel advance, I acknowledge that I have read and understand the terms of the travel advance detailed above.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
SBA Treasurer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Assistant Dean for Students & Diversity Services

\_\_\_\_\_  
Date