WUCL Student Organization Orientation

I’VE BEEN ELECTED TO THE EXECUTIVE BOARD!!!

NOW WHAT?
Willamette Resources

Office of Student Affairs (OSA), 2nd floor

Contact Maegan Dunlap for commencement/graduation information, ADA Exam Accommodations and registration related questions.

mdunlap2@willamette.edu

Contact Andrea Saele for scheduling classrooms in law building.

asaele@willamette.edu

Contact Ann Allen for budget access, student organization rosters updates, reimbursement requests and travel coordination.

aallen2@willamette.edu

Note: The OSA open window hours: Monday-Friday 8:00am-4:00pm.
Office of Career Planning & Development

Contact Marti McCausland to minimize event conflicts with Placement events

mmccausland@willamette.edu

**Please remember**

Wednesday lunch hours are reserved for the Career Planning Office events. Contact them with questions.
Graduate Alumni Relations

Tiffany Newton  -  Director of Graduate Alumni Engagement
trnewton@willamette.edu

Please contact Tiffany prior to planning fundraisers to be sure we don’t overlap with fundraising efforts for the University.

She can also help with outreach to alumni for donations, publicity, speaker requests, etc.
Collecting Funds for a Fundraiser

The University is now CASHLESS!

**Credit Card Machines available to borrow** - check out from Accounting for up to a week at a time. The Accounting is office located in building behind the law school

[https://willamette.edu/offices/accounting/merchantservices/index.html](https://willamette.edu/offices/accounting/merchantservices/index.html)

- Only wired machines work in Law School
- Wireless options on campus – machines WILL NOT work off campus
- Square now available – 2.75% fee charged per swipe

PLEASE don’t use apps such as Venmo, Zelle, Google Pay, etc.
Established groups already have a budget and general ledger number (GL#). Budget information is accessible from SAGE.

You will use the GL # for:

- expense reimbursements
- making purchases on campus (Bon Appétit, Print Design. Bookstore can no longer do this)

An example of a GL number:

<table>
<thead>
<tr>
<th>Fund</th>
<th>Unit</th>
<th>Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>9WXXX</td>
<td>2213</td>
</tr>
</tbody>
</table>

OR

5WXXX

Law Review, WJILDR, Moot Court, WLO - GL numbers begin with 10

Organizations should email Ann Allen with the names of the President and Treasurer and she’ll request budget access from Accounting.
Accessing GL Reports

Log into **Student Portal**
Click on Financial Management

In Financial Management Overview choose Finance Query
No Financial Management tab?

Try the side bar menu under Daily Work
Organization Accounting

Click **Filter**

**Fund** – 2 digits

- 21 – groups who receive SBA funding
- 10 – groups funded via the University (Law Review, WLO, Moot Court, WJILDR)

**Unit** – 5 digits

- 9Wxxx or 5Wxxx – most student organizations (funded by SBA)
- 10xxx – WLO, Moot Court, WJILDR, Law Review

**Object** - leave blank to bring up all accounts for the group
Google Groups Access

- Organization mail groups are now Google Groups – Access via 9 dot grid – Click on “Groups” icon:

- Group presidents and treasurers will be “Owners” of the organization groups, so they can add/delete members

- Messages subject to approval – please use for student organization & SBA events and school related activities only

- Keep in mind that time of day can affect how quickly messages post
Law-stu and class groups are now:

- **Willamette College of Law - All Students**
  law-students@willamette.edu
  All Law Students

- **Willamette College of Law - Class of 2021**
  law-2021@willamette.edu
  All Law students graduating in 2021

- **Willamette College of Law - Class of 2022**
  law-2022@willamette.edu
  All Law students graduating in 2022

- **Willamette College of Law - Class of 2023**
  law-2023@willamette.edu
  All Law students graduating in 2023

- **Willamette College of Law - Class of 2024**
  law-2024@willamette.edu
  All Law students graduating in 2024
Expense Reimbursements

Keep all itemized receipts to submit for reimbursements when paying out of pocket

- All reimbursements use this form!
- Form is located on the Student Portal under forms
- Requests must be submitted within 30 days of purchase
- Must include itemized receipts
- Must be submitted to Accounting electronically - Ann can submit them for you
- Be sure to include your student ID number under Payee ID
Expense Reimbursements

Setting up Direct Deposit for E-Checks in SAGE

From the *Welcome to Self Service* page click **Banking Information**.

Click **+Add an Account** on the right hand corner.

Slide the **Activate** button to the right to turn it on & click **Next**.

On the next page enter **Routing Number, Bank Account Number**. Select Account Type (Checking or Savings).

At the bottom of the page check the the **Terms and Conditions** box.

Click **Submit**
Event Planning

Updated COVID Policy for visitors as of July 30th:

All visitors, **regardless of vaccination status**, are required to wear a mask while on campus.

Exceptions to this requirement may be made for guest speakers or lecturers whose vaccination status has been affirmed by the university host.

**NEW UNIVERSITY GUIDANCE**

No more than 25 external guests are permitted in attendance at university-hosted events (whether on or off campus). Any exception to the policy must be filed by Dean Gallini.

COVID-19 Information

We are excited to welcome new and returning students to our vibrant and flourishing campuses this fall! Please take a look at our updated policy regarding COVID-19.

COVID-19 POLICY FOR WILLAMETTE CAMPUSES AS OF JULY 30, 2021

- Vaccinations
- Masking
- Room capacity and physical distancing
- Building Access

Visitor Policy (as of July 30, 2021)

- A visitor is defined as an individual who is not a Willamette or CST student, faculty member, staff member, volunteer, contractor or vendor approved to be present on campus at this time.
- Visitors indoors in Willamette facilities are restricted to those invited and hosted by a faculty or staff member, a department or division, student, or other authorized affiliate of Willamette.
- All visitors, regardless of vaccination status, are required to wear a mask while on campus. Exceptions to this requirement may be made for guest speakers or lecturers whose vaccination status has been affirmed by the university host.
Event Planning-Scheduling

Organizations should choose one officer to have scheduling access.

- Contact Andrea Saele for access asaele2@willamette.edu

Check for room availability.

ALL students have viewing ability in EMS.

https://willamette.edu/offices/service-center/scheduling-and-events/index.html
DO’s and DON’Ts

DO consider flyers for your event --- willamette.edu/offices/print-design

DO make your space request at least 10 days prior to the event and allow at least 72 hours for your event to be confirmed.

DON’T schedule anything back to back with a class or other events/meetings. Lunch break is 12:30pm. Classes end at 12:20 pm and resume at 1:40 pm.

DON’T schedule large events during other large events. Consider availability for:

Catering    WITS    Facilities

DO include ALL of the details and requests for your orders at the time of the room request. You won’t be able to add services after the room has been confirmed.
Event Promotion

Cindy Cromwell - Communications Manager

cromwell@willamette.edu

To get help with your event, click this Event Help link on Cindy’s page:

It is also available via a teal menu tab on the Student Portal or the Announcement section of the Current Student FB page (top of the page)

Cindy can help with:

- Creating slides for the law school digital displays
- Submitting your event to the Law Events Calendar and Student Activities Calendar
- Posting your event information on the Willamette Current Students Facebook group and the college’s Instagram account
- Submit information 4 to 5 days in advance of the event to get the event published in time!
Event Promotion

Boosting Meeting Attendance with Incentives

Use the words “Giveaways” or “Doorprize” or “Drawing”. Please don’t use “Raffle”!

- Raffle is a term used for collecting money and giving out a prize at a later date (like a lottery ticket). WU does not have a raffle license.

- Remember that gift cards cannot be reimbursed - make giveaways tangible items.
  - Reimbursement requests should be submitted within 30 days of when the expense was incurred.

- Be mindful about keeping the cost of incentives reasonable.
  - Money allocated from SBA is part of the fees every student pays. Take the perspective of those not involved in your organization -- would they be OK with their own student fees being used as an "incentive" to encourage attendance?
Event Planning

Space Rental Contracts for Off Campus Events

Review and approval by Dean Dobbins—give contract to OSA

Serving food at your event - Bon Appétit

catering@willamette.edu

***Lunch meetings - Food must be consumed in Rick's Cafe or in the Hearings Room in the Carnegie building

Serving alcohol

Request form

Security – contact Campus Safety

https://willamette.edu/offices/service-center/scheduling-and-events/requests-forms/index.html
Event Planning - Food

Tricia Matte  Catering Manager~tmatte@willamette.edu

Bon Appétit Catering Guide  ~ cafebonappetit.com

• Use GL# to pay for purchases directly with Bon Appétit.
• Give 10 days notice for orders
• You can get a 15% discount for events or orders that you pickup, setup, and cleanup yourselves.
• Pickup at the delivery entrance near the Mill Creek. Ring the doorbell if the doors are closed.
There are a limited number of student events where serving alcohol is appropriate. Please visit with the Deans prior to planning events with alcohol.

- Organization budget money can be used for alcohol set up fees, but not to purchase alcohol.
- Events with alcohol must be set up as a no-host bar.
- Drink tickets cannot be included with events that charge admission.
- Advertised events that will offer alcoholic beverages must have all publicity approved – visit OSA for help
Event Planning - Alcohol

- Alcohol must only be served through the University’s approved third party vendor, **Bon Appétit** or an OLCC licensed vendor.

- **Alcohol Use Request Form**
  - Submitted online **12 working days** prior to the event
  - Make reservation in EMS – form should pop up as option

- **Security – Once Alcohol Use form has been approved:**
  - Campus Safety ~ Rich Dennis  *rdennis@willamette.edu*
  - No later than **10 business days** before event date
  - Provide GL account number as well as event dates and times
Event Planning - Alcohol

- Appealing non-alcoholic beverages and food must be served at all events.

- Food in sufficient quantity must be available for the number of guests expected—Bon Appetit can assist with this.

- Participants and Willamette guests must be prepared to produce identification verifying age status, when asked.
Event Planning

Hosting a Zoom Event

● Become familiar with Zoom’s policies: [https://zoom.us/docs/en-us/acceptable-use-policy.html](https://zoom.us/docs/en-us/acceptable-use-policy.html)

● Avoid “zoom bombing” by utilizing the waiting room feature so guests can be verified.

● For large public events, consider doing a **Zoom webinar**. Participants do not have audio or video, they are only able to see and hear the presenters, and are able to submit written questions.

● When advertising an event via social media, **request RSVPs**, then email registrants the link and password once they have been verified. Host should allow event entry for only RSVP guests via the waiting room.
Guidelines for planning a Movie Watch Party

- Choose a platform that is already set up to hold a "watch party" like Amazon Prime or Netflix. Streaming a movie over Zoom by sharing a computer screen is a violation of Willamette’s user agreement.

- Be aware of your chosen platform’s viewing policies, such as limits on number of viewers.

- Let OSA know if your group needs advice on how to purchase the copyright to a movie for a public viewing.
# Student Bar Association

SBA: “An organization for the control of all matters of general student concern.”

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>Trish Conlon</td>
<td>Preside over meetings. Carry out the SBA Constitution and Bylaws.</td>
</tr>
<tr>
<td>1st Vice President</td>
<td>Gennifer Goldstein</td>
<td>Run elections, oversee appointments to committees, conduct President meetings.</td>
</tr>
<tr>
<td>2nd Vice President</td>
<td>Rachel Lara</td>
<td>Social chairperson</td>
</tr>
<tr>
<td>Secretary</td>
<td>Open position</td>
<td>Minutes kept and posted</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Alex Teesdale</td>
<td>Keep accounting, Chair Budget Committee, liaison with organization Treasurers</td>
</tr>
<tr>
<td>Ombudsperson</td>
<td>Lauren Deits</td>
<td>Contact with outside vendors, Budget Committee member cleans refrigerators</td>
</tr>
<tr>
<td>ABA Liaison</td>
<td>Open position</td>
<td>Update on ABA issues/opportunities</td>
</tr>
<tr>
<td>JDA Representative</td>
<td>Andrew Hendrie</td>
<td>Liaison with Business school</td>
</tr>
</tbody>
</table>

The 1L, 2L and 3L Presidents each have a seat on the board. They have a vote and are responsible for bringing issues forward from each of the classes.
SBA Budget Request Process

Two budget periods per year:

**Fall** – Approximately September 12th to February 11th.

**Spring** – Approximately February 12th to September 11th of the next academic year.

*Emergency Funding* is available for unforeseen expenses.
At Least One Week Prior to Class Elections:

SBA Treasurer sends out Budget Forms:

- Organization’s Accounts Spreadsheet
- Supplemental Information Google Form
  * Request for Supporting Documentation (If needed to clarify budget request)

Required Supporting Documentation Includes:

- General Ledger Statements
- Check Request Copies
- Copies of flyers or notices announcing activities from last budget period
### Spreadsheet Best Practices:

Use “financial management” in SAGE

Be Specific!

Write individual line items (events, speakers, etc.) under “Special Expenses”

Send via email: ajteesdale@willamette.edu
Supplemental Form Best Practices:
Complete fully!
Be Specific!
Submit via Form

Budget Committee’s Factors of Review:
Membership, # of meetings, Financial health of account, Previous/requested disbursement, Benefit to Student Body, Org’s Narrative Justification
SBA Budget Request Process

**Sept. 20, 2021 at 5 pm:** Completed Budget Packets are due

**Sept. 30, 2021 at TBD, Location TBD:** Budget committee meets to review budget requests

  - Budget committee: SBA Treasurer, Ombudsperson, Class Treasurers

  - Student Orgs **may** attend, but not mandatory

**SBA Executive Meeting after Sept. 30, 2021:** Budget committee presents to the SBA Executive Board.

  - SBA Executive Board votes to approve disbursements.

  - Allocations are made after process is completed. Justifications sent to each Org.
Other Sources of Information

SBA Constitution and Student Bylaws

SBA Treasurer, Alex Teesdale, ateesdale@willamette.edu

SBA Executive Board Meetings

Upcoming Information for Fall 2021

SBA Representatives at Student Org Orientations this week

Budget Request Forms will also be added to Student Org Forms on the OSA Page