# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td>3</td>
</tr>
<tr>
<td><strong>Important Contacts</strong></td>
<td>3-4</td>
</tr>
<tr>
<td><strong>Important Dates</strong></td>
<td>5</td>
</tr>
<tr>
<td><strong>Common Costs</strong></td>
<td>6</td>
</tr>
<tr>
<td><strong>Student Organization Benefits and Structure</strong></td>
<td>6-7</td>
</tr>
<tr>
<td><strong>Leading an Organization</strong></td>
<td>8-11</td>
</tr>
<tr>
<td>Running a Meeting</td>
<td>8</td>
</tr>
<tr>
<td>Brainstorming</td>
<td>9</td>
</tr>
<tr>
<td>Delegation</td>
<td>9</td>
</tr>
<tr>
<td>Setting Goals</td>
<td>10</td>
</tr>
<tr>
<td>Officer Transition</td>
<td>10-11</td>
</tr>
<tr>
<td><strong>Policies for Student Organizations</strong></td>
<td>10-16</td>
</tr>
<tr>
<td>Academic</td>
<td>11</td>
</tr>
<tr>
<td>Advisors</td>
<td>11</td>
</tr>
<tr>
<td>Alcohol Policy</td>
<td>12</td>
</tr>
<tr>
<td>All Campus Emails</td>
<td>12</td>
</tr>
<tr>
<td>Contracts</td>
<td>12</td>
</tr>
<tr>
<td>Food</td>
<td>12</td>
</tr>
<tr>
<td>Hazing</td>
<td>12-13</td>
</tr>
<tr>
<td>Insurance</td>
<td>13</td>
</tr>
<tr>
<td>Non-Discrimination Policy</td>
<td>13</td>
</tr>
<tr>
<td>Security</td>
<td>13</td>
</tr>
<tr>
<td>Scheduling</td>
<td>13</td>
</tr>
<tr>
<td>Showing Visual Media</td>
<td>14</td>
</tr>
<tr>
<td>Social Media</td>
<td>14-15</td>
</tr>
<tr>
<td>Title IX</td>
<td>15</td>
</tr>
<tr>
<td>Travel</td>
<td>15-16</td>
</tr>
<tr>
<td>Waivers</td>
<td>16</td>
</tr>
<tr>
<td><strong>Resources for Student Organizations</strong></td>
<td>17-18</td>
</tr>
<tr>
<td>ASWU Sound</td>
<td>17</td>
</tr>
<tr>
<td>ASWU Stage</td>
<td>17</td>
</tr>
<tr>
<td>Email</td>
<td>17-18</td>
</tr>
<tr>
<td>Fire Pits</td>
<td>18</td>
</tr>
<tr>
<td>Printing</td>
<td>18</td>
</tr>
<tr>
<td>Room Set-Up</td>
<td>18</td>
</tr>
<tr>
<td>Webpages</td>
<td>18</td>
</tr>
<tr>
<td>WITS</td>
<td>18</td>
</tr>
<tr>
<td><strong>Publicity</strong></td>
<td>18-22</td>
</tr>
<tr>
<td>Basics</td>
<td>18-19</td>
</tr>
<tr>
<td>Policies</td>
<td>19</td>
</tr>
<tr>
<td>Publicity (continued)</td>
<td></td>
</tr>
<tr>
<td>Campus Distribution Route</td>
<td>20</td>
</tr>
<tr>
<td>Specific Location Information</td>
<td>21-22</td>
</tr>
<tr>
<td>Academic Buildings</td>
<td>21</td>
</tr>
<tr>
<td>Art Wall</td>
<td>21</td>
</tr>
<tr>
<td>Bathroom Stalls</td>
<td>21</td>
</tr>
<tr>
<td>Bearcat Bulletin</td>
<td>21</td>
</tr>
<tr>
<td>Bistro</td>
<td>21</td>
</tr>
<tr>
<td>Digital Poster</td>
<td>21</td>
</tr>
<tr>
<td>Events Calendar</td>
<td>21</td>
</tr>
<tr>
<td>Google Calendar</td>
<td>21</td>
</tr>
<tr>
<td>Goudy Commons</td>
<td>21</td>
</tr>
<tr>
<td>Grounds</td>
<td>21</td>
</tr>
<tr>
<td>Library Boards</td>
<td>21</td>
</tr>
<tr>
<td>Mail Center</td>
<td>21</td>
</tr>
<tr>
<td>Residence Halls</td>
<td>21-22</td>
</tr>
<tr>
<td>Service Projects</td>
<td>22</td>
</tr>
<tr>
<td>Sororities</td>
<td>22</td>
</tr>
<tr>
<td>University Center</td>
<td>22</td>
</tr>
<tr>
<td>WU Logo/Imprint Request</td>
<td>22</td>
</tr>
<tr>
<td><strong>Money</strong></td>
<td></td>
</tr>
<tr>
<td>Budget Basics</td>
<td>22-23</td>
</tr>
<tr>
<td>ASWU Funding</td>
<td>23-27</td>
</tr>
<tr>
<td>Finance Committee</td>
<td>23</td>
</tr>
<tr>
<td>Budget Hearings</td>
<td>23-24</td>
</tr>
<tr>
<td>ASWU Funding Requirements</td>
<td>24</td>
</tr>
<tr>
<td>Precedents &amp; Standards</td>
<td>24</td>
</tr>
<tr>
<td>Funding Request</td>
<td>24-25</td>
</tr>
<tr>
<td>Inventory Disclosure</td>
<td>25</td>
</tr>
<tr>
<td>Accessing Accounts</td>
<td>25</td>
</tr>
<tr>
<td>Reading a G/L Report</td>
<td>25-26</td>
</tr>
<tr>
<td>Using Funding</td>
<td>27</td>
</tr>
<tr>
<td>Transitioning</td>
<td>27</td>
</tr>
<tr>
<td>Fundraising</td>
<td>27-28</td>
</tr>
<tr>
<td>Bake Sales</td>
<td>28</td>
</tr>
<tr>
<td>Raffles and Door Prize Drawings</td>
<td>28</td>
</tr>
<tr>
<td><strong>Event Planning 101</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Forms</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Basics</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Policies</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Publicity</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Resources for Student Organizations</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Money</strong></td>
<td></td>
</tr>
</tbody>
</table>
Introduction

Student organizations are an important component of the educational community at Willamette University. They are the outlets through which students explore curricular and co-curricular interests. The leadership positions associated with student organizations provide the opportunity to learn time management, communication, collaboration, delegation, event planning, and many other important transferable professional skills.

Student organizations and their leaders follow all University policies and procedures in addition to federal, state, and local laws. Each registered student organization identifies at least one Willamette University faculty or staff member to serve as its advisor. The Office of Student Activities serves as the primary resource for student organization leaders and their advisors. Just for your information, there have been a variety of policy updates this year, so please make sure to visit all aspects of this handbook to stay updated.

This handbook is a guide for the leaders of student organizations at Willamette University. It is intended for use as a resource to answer questions and access campus resources. Additional information can be found online at the Office of Student Activities website at willamette.edu/offices/osa/orgs/index.html

Important Contacts

Student Activities
503-370-6463
Putnam University Center, 2nd floor
http://willamette.edu/offices/osa

The Office of Student Activities enhances the academic mission of the University by providing personal attention for students as their primary resource for co-curricular involvement.

Some of the resources available In the Student Activities office
- Answers to your questions
- Blue Tape for Publicity
- Banner Paper
- Computers
- Construction Paper
- Die-Cut Machine
- Friendly, helpful staff
- Leadership Resource Library
- Markers
- Paper Cutters
- Sandwich Boards
- Dry Erase Boards

Zachery Cardoso <zcardoso>  
- Administrative Program Coordinator

Lisa Holliday <lcjones>  
- Director of Student Activities and  
- Senior Associate Dean of Students

Emily Morris <aemorris>  
- Associate Director of Student Activities
### Other Important Contacts

<table>
<thead>
<tr>
<th>Topic</th>
<th>Name</th>
<th>Location</th>
<th>Email/Web Address</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASWU Sound</td>
<td>Denise Diaz</td>
<td>No office</td>
<td>willamette.edu/org/aswusound/index.html</td>
<td>503-370-6058</td>
</tr>
<tr>
<td>Audio/Visual Equipment</td>
<td>WITS</td>
<td>Smullin 101</td>
<td>willamette.edu/offices/wits</td>
<td>503-370-4103</td>
</tr>
<tr>
<td>Banner Lines (UC 1st floor)</td>
<td>Student Staff</td>
<td>UC 2nd floor</td>
<td>&lt;student-activities&gt;</td>
<td>503-370-6463</td>
</tr>
<tr>
<td>Bistro Coffee Service</td>
<td>Asalia Arauz</td>
<td>UC 1st Floor</td>
<td>willamette.edu/offices/bistro</td>
<td>503-370-6900</td>
</tr>
<tr>
<td>Budgets</td>
<td>ASWU Treasurer</td>
<td>UC 2nd Floor</td>
<td>&lt;semische&gt;</td>
<td>503-370-6058</td>
</tr>
<tr>
<td>Catering</td>
<td>Bon Appétit</td>
<td>Goudy Commons</td>
<td>&lt;catering&gt;</td>
<td>503-370-6788</td>
</tr>
<tr>
<td>Check Requests (ASWU)</td>
<td>ASWU Treasurer</td>
<td>UC 2nd Floor</td>
<td>&lt;semische&gt;</td>
<td>503-370-6058</td>
</tr>
<tr>
<td>Check Requests (non-ASWU)</td>
<td>Accounting</td>
<td>Executive Building</td>
<td>&lt;accounting&gt;</td>
<td>503-370-6104</td>
</tr>
<tr>
<td>Digital Poster Program</td>
<td>Student Activities</td>
<td>UC 2nd Floor</td>
<td>&lt;zcardoso&gt;, &lt;aemorris&gt;</td>
<td>503-370-6143</td>
</tr>
<tr>
<td>Fundraising (external)</td>
<td>Patricia Adams</td>
<td>Waller 4th Floor</td>
<td>&lt;pwadams&gt;</td>
<td>503-370-6952</td>
</tr>
<tr>
<td>Hudson Hall</td>
<td>Mike Bergh</td>
<td>Rogers Music Center 140</td>
<td>&lt;mbergh&gt;</td>
<td>503-370-5438</td>
</tr>
<tr>
<td>Imprint Request (using WU name or logo in print) &amp; t-shirt vendor approval</td>
<td>Mike Wright</td>
<td>Waller Hall</td>
<td>&lt;mawright&gt;</td>
<td>503-370-6885</td>
</tr>
<tr>
<td>Mill Stream/Outdoor Publicity</td>
<td>Jim Andersen</td>
<td>Grounds Department</td>
<td>&lt;janderse&gt;</td>
<td>503-370-6143</td>
</tr>
<tr>
<td>Publicity Policies</td>
<td>Student Activities</td>
<td>UC 2nd floor</td>
<td>willamette.edu/offices/osa</td>
<td>503-370-6463</td>
</tr>
<tr>
<td>Room Set-up</td>
<td>EMS</td>
<td>Facilities Support Services</td>
<td>&lt;aperez&gt;</td>
<td>503-370-6549</td>
</tr>
<tr>
<td>Sandwich Boards</td>
<td>Student Activities</td>
<td>UC 2nd Floor</td>
<td>&lt;student-activities&gt;</td>
<td>503-370-6463</td>
</tr>
<tr>
<td>Scheduling</td>
<td>Zachery Cardoso</td>
<td>UC 2nd Floor</td>
<td>&lt;zcardoso&gt;</td>
<td>503-370-6463</td>
</tr>
<tr>
<td>Security</td>
<td>Campus Safety</td>
<td>University Services Bldg.</td>
<td>&lt;safety&gt;</td>
<td>503-370-6911</td>
</tr>
<tr>
<td>Smith Auditorium</td>
<td>Mike Bergh</td>
<td>RMC 140</td>
<td>&lt;mbergh&gt;</td>
<td>503-370-5438</td>
</tr>
<tr>
<td>Sparks Center</td>
<td>Kosti Efstaithiou</td>
<td>UC 2nd Floor</td>
<td>&lt;campus-rec&gt;</td>
<td>503-370-6217</td>
</tr>
<tr>
<td>Social Media</td>
<td>University Communications</td>
<td>Waller Hall</td>
<td>&lt;social-media&gt;</td>
<td>503-370-6184</td>
</tr>
<tr>
<td>Tabling in UC or Goudy</td>
<td>Student Activities</td>
<td>UC 2nd Floor</td>
<td>&lt;student-activities&gt;</td>
<td>503-370-6463</td>
</tr>
<tr>
<td>Travel Policy</td>
<td>Student Activities</td>
<td>UC 2nd Floor</td>
<td>willamette.edu/offices/osa</td>
<td>503-370-6463</td>
</tr>
<tr>
<td>Volunteering</td>
<td>Community Service Learning</td>
<td>UC 2nd Floor</td>
<td>&lt;service&gt;</td>
<td>503-370-6463</td>
</tr>
<tr>
<td>Webpages</td>
<td>&lt;webdev&gt;</td>
<td>University Services Annex</td>
<td><a href="http://willamette.edu/offices/webdev/">http://willamette.edu/offices/webdev/</a></td>
<td>503-370-6517</td>
</tr>
</tbody>
</table>

Note: <email> = email@willamette.edu
## Important Dates

### Activities and Resources Expo  
**Sept. 6**  
4:30 - 6:30 p.m.  
Mill Stream & Jackson Plaza

### Student Organization Orientations  
**Fall Dates**
- **Sept. 19**: 4:00 - 5:00 p.m.  
  Alumni Lounge  
- **Sept. 26**: 4:00 - 5:00 p.m.  
  Alumni Lounge  
- **Oct. 3**: 4:00 - 5:00 p.m.  
  Alumni Lounge  
- **Oct. 10**: 4:00 - 5:00 p.m.  
  Alumni Lounge  
- **Oct. 17**: 4:00 - 5:00 p.m.  
  Alumni Lounge  
- **Oct. 31**: 4:00 - 5:00 p.m.  
  Alumni Lounge  
- **Nov. 7**: 4:00 - 5:00 p.m.  
  Alumni Lounge  
- **Nov. 14**: 4:00 - 5:00 p.m.  
  Alumni Lounge  

**Spring Dates** will be announced January 2019. They will be posted on the Student Activities webpage (http://willamette.edu/offices/osa/index.html) and sent to club presidents and treasurers via email.

### Sign Ups Available for Finance Committee Hearings and Presentations

**Fall Round**
- 1: 9/14 - 9/21  
  Finance Board Date: 9/24  
  ASWU Office; 2nd floor of the UC
- 2: 10/5 - 10/12  
  Finance Board Date: 10/15  
  ASWU Office; 2nd floor of the UC
- 3: 11/23 - 11/30  
  Finance Board Date: 12/3  
  ASWU Office; 2nd floor of the UC

**Spring Round**
- 1: 1/25 - 2/1  
  Finance Board Date: 2/4  
  ASWU Office; 2nd floor of the UC
- 2: 2/22 - 3/1  
  Finance Board Date: 3/4  
  ASWU Office; 2nd floor of the UC
- 3: 3/29 - 4/5  
  Finance Board Date: 4/8  
  ASWU Office; 2nd floor of the UC

*Note: Sign-ups will close at 5pm on the Wednesday prior to each Budget Hearing*

### Spring Finance Committee Hearings  
Spring Dates will be announced January 2019.

### Senate Meetings  
Every Thursday at 7:00pm in Ford 102

### Spring Activities Fair  
Date will be announced January 2019

### Annual Registrations Due  
(Including rosters, updated constitutions)  
Date will be announced January 2019

### ASWU Accounts Zeroed  
End of Each Semester: December 31 and May 31
### Common Costs

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sheets</td>
<td>$1.00/each</td>
<td>Book through EMS</td>
</tr>
<tr>
<td>Vans:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enterprise: 7 passenger vans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price is $54.26 per day for a van. No limits on miles per day. <strong>All student organizations who want to reserve an Enterprise van must go through Zachery Cardoso.</strong></td>
<td>Zachery Cardoso &lt;zcardoso&gt; 503-370-6463</td>
<td></td>
</tr>
<tr>
<td>School buses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capacity: 50 passengers. Price is $197 for first three hours and $53 for each additional hour. For charter buses, prices vary.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Security</td>
<td>$76/officer ($19/officer/hour w/ 4 hour minimum)</td>
<td>&lt;safety&gt; 503-370-6911</td>
</tr>
<tr>
<td>WITS Graphic Design and Media Services</td>
<td>$10/hour $20/hour for rush (24 hours or less, Layout and Design in less than 5 working days)</td>
<td>Chris Gramlich &lt;cgramlic&gt; or willamette.edu/wits/production</td>
</tr>
<tr>
<td>Printing</td>
<td>Varies</td>
<td>&lt;printdesign&gt; or willamette.edu/offices/print_design/</td>
</tr>
<tr>
<td>Banner Paper</td>
<td>Free for club use (advertisement making only). Up to 6 feet per request. If a club needs a larger quantity (for an approved activity), contact Zach in advance to purchase a roll of paper. $0.10/foot for any other reason</td>
<td>Zachery Cardoso &lt;zcardoso&gt; 503-370-6463</td>
</tr>
</tbody>
</table>

### Student Organization Benefits and Structure

**To be a recognized Willamette University student organization, the following criteria must be met:**

1. The organization must complete the club approval process (application approved by the Club Approval Committee and ASWU).
2. The organization must have an advisor who is a full time member of the Willamette University faculty, staff, or administration who is **not** on sabbatical or leave.
3. The membership of the organization must be composed of at least 50 percent fee-paying Willamette University students.
4. The organization must have a current constitution and roster on file with the Office of Student Activities.
5. The organization must complete required annual registration (spring) and roster requests (fall and spring) and attend an annual Student Organization Orientation.

**The benefits of officially registering a student organization with the Office of Student Activities include:**

1. Listing on the Office of Student Activities website.
2. Ability to request ASWU funding (note: organizations must attend annual Student Organization Orientations to be eligible to receive funding. See pages 24-26 for more information).
3. Reserve and use of any WU on-campus facility, in accordance with scheduling guidelines. Contact <student-activities> to learn about how to reserve space on campus.
4. Ability to participate in the Fall Activities and Resources Expo and the Spring Activities Fair.
5. Rental of vans through Enterprise; school bus reservations through First Student.
6. Access to the Mail Center to stuff flyers in student mailboxes.
7. Free use of poster-making supplies and blue tape (poster markers, letter cutter, and poster paper), for the purpose of advertising an event or program. **Poster supplies may not be used for door decorations, birthdays or other types of individual recognition, or decorating for an event (e.g., covering walls and ceilings).**
8. Access to advising and resources on a variety of topics of interest to organizations.
Organization Classifications

These classifications are used to help define the purpose and mission of student organizations.

**Organization Classifications**

- **Academic**
  Group seeks to further intellectual goals, specific to a subject area. Groups may be linked to and supported by an academic department.

- **Greek**
  Group is a social fraternity or sorority recognized and supported by the Interfraternity Council (IFC) or Panhellenic Council (PHC).

- **Honorary**
  Group membership is based on merit, accomplishments, honors, or qualifications in specific areas.

- **Media**
  Group exists to promote interest in, creation of, and appreciation of literary or visual media (e.g., newspaper, radio, magazine, etc.).

- **Multicultural**
  Group exists to educate, engage, & support cultural knowledge & identities that may include: social justice, traditions, celebrations, or intersections of culture.

- **Performing Arts**
  Group exists to promote interest in, creation of, and appreciation of performing arts (e.g., vocal, instrumental, dance, theater).

- **Religious**
  Group exists to educate, engage, and support religious and/or spiritual growth, belief, or affiliation.

- **Service**
  Group exists to promote interest and support experience in service to community through volunteering and service-learning opportunities.

- **Social & Support**
  Group exists to foster relationships and serve as a support system for students’ social interests, pastimes, and causes.
Running Meetings: The 5 A's

Do you dread attending meetings because they are dull, unproductive, disorganized or too long? With proper planning and preparation, any meeting can be effective and enjoyable! The following are some tips to help you make your next meeting successful, productive and fun.

**Agenda**
- Define the purpose(s) of the meeting with an agenda.
- May include: announcements, corrections from previous meetings, reports from various officers/committees, unfinished business, new business, discussion items, etc
- Distribute before meeting (along with any other important documents).
- Stick to the agenda - encourage relevant discussion but always be respectful of people’s schedules

**Atmosphere**
- Reserve a room. Consider the following:
  - Size: small enough for connection but large enough to accommodate personal space
  - Arrangement: Circular and U-shape allows for seeing all members
  - Visuals: do you need a PowerPoint or some other visual?
  - If budget allows, serve light refreshments when possible
  - Greet members and be welcoming
  - Role model good meeting behavior and listen attentively - stay away from your cell phone and other distractions

**Accomplishments**
- Take minutes - these are a record of actions taken. These are useful for future members as well as members not able to attend. They also serve as useful reminders for items discussed.
- Tips:
  - Use agenda as outline for minutes
  - Use bullets to represent different findings, discussions and decisions
  - Note topics for future decisions
  - Distribute to members after meeting (within 24 hours)

**Adjournment**
- Summarize agreements reached and clarify who will do what before the next meeting.
- End on a positive note by asking members what they thought was good or successful, or even end with a fun team builder
- Set a date, time and place for the next meeting (if another meeting is really necessary)

**Assessment**
- Discuss any problems during the meeting with other officers. Come up with solutions to implement at the next meeting.
- Follow-up on delegated tasks.
- Give recognition and appreciation to excellent and timely progress
- Put unfinished business on the agenda for the next meeting
- Conduct periodic evaluations of the meetings
Brainstorming

Brainstorming is just what you need to get started on the right foot or to rejuvenate your organization and get everyone excited and involved. The purpose of brainstorming is to get out as many ideas as possible. The more ideas from which you can choose, the better your final choice will be. But there are rules to brainstorming to make it effective! Follow these 3 simple steps for an efficient, productive brainstorming session!

1. Set the Stage:
   - Set a time limit. The time limit will depend on the size of your group. Try 10 minutes for small groups and 20 minutes for larger groups.
   - The best group size is 3 - 10 people. If you have more, break into two or more groups and brainstorm simultaneously.
   - The question or issue must be one to which all participants can speak. Focus on only one issue at a time.
   - Record all of the responses on a black- or white-board or big sheet of paper so everyone can see them. Do not record the name of the person suggesting. Record only key words and phrases, not word for word.

2. Explain the Rules Before Beginning:
   - Do not discuss ideas, simply record.
   - Do not criticize, praise, or judge.
   - Be spontaneous, no hand-raising, just call out.
   - Have one person record all the ideas.
   - Repetitions are okay.
   - Quantity counts, get as many ideas recorded as possible, as quickly as possible.
   - Build on each other’s ideas, “hitch-hiking” or “piggy-backing” is encouraged.
   - Be comfortable with silence, often the best ideas come out of them.
   - It is okay to be outrageous, even silly: Think Big!

3. After the Brainstorm: Make Good Use of Your Members’ Creativity:
   - If several groups brainstormed the same idea, post the lists and let everyone read each other’s work.
   - Combine ideas into related categories for review.
   - Prioritize which ideas are most promising and which can be eliminated.
   - Discuss which of the remaining ideas can be made the most SMART (see section below).
   - Select those with the greatest potential and high-ranking priority for either implementation or refinement by your organization.
   - Use the ideas generated. It is frustrating for a group to invest its time, energy, and creativity, but never see their ideas become actions.

Delegation

One of your greatest tools as a leader is the ability to delegate, or share the responsibilities with others in your group. Delegation sounds easy but can actually be pretty hard. **For assistance with delegation, or to schedule a delegation workshop for your group, contact Emily Morris at aemorris**

**Checklist for Effective Delegation**

- Be clear about what needs to get done and be ready to give instructions as needed.
  - This means you’ll need to be organized enough to know what needs doing!
- Spread the enjoyable, responsible, and recognized tasks around, giving more members ownership, status, and value.
- Delegate whole segments that make sense, not bits and pieces of a task.
  - Choose the appropriate people. Consider their time, interest, and capabilities. Here are a few ways to choose the right people for the task:
    - Ask for volunteers by a show of hands or passing around a sign-up sheet.
    - Ask or suggest someone and share why you selected him/her. Sometimes members lack self-confidence and won’t volunteer; asking them demonstrates your confidence in their ability to do it.
    - Assign a committee. This takes the pressure off an individual and reinforces organizational structure.
- Discuss ideas and mutually set goals and objectives.
  - Give those who are responsible for carrying out a program a voice in the decision-making.
- Openly share information, plans, and updates with everyone.
- Clearly define the responsibilities being delegated to each person.
  - Explain what is expected of the person(s) and the bounds of authority.
  - Agree on areas where the person can function freely.
  - Remember that the end result is important, not the steps to get there.
- Set deadlines.
  - Remember, delegating does not eliminate work, it simply changes it.
  - Mutually decide when it is appropriate to complete the task(s).
- Agree on how they will let you know when they need help.
- Actually delegate.
  - Most people do not appreciate someone looking over their shoulder or taking back parts of their assignment before they have a chance to do it. Your members are your greatest resource. Let them create, and let them put their creativity into action!
- Give accurate and honest feedback at an appropriate time.
Setting Goals

Goals describe what you want to accomplish. Organizations of all types are the most successful when they begin with their end in mind by setting SMART goals. Be sure that you are using your time and resources effectively. Set aside time at the outset of each new project or idea with a goal-setting activity. Keep goal-setting fun (see brainstorming section above).

SMART Goals

**Specific:** significant, stretching
- How can you make your goal more specific? Narrow the scope of your goal to something that can be observed by someone else.

**Measurable:** meaningful, motivational
- How could you quantify some, part or your entire goal? Even if the goal isn’t something that can be counted/measured, you could measure how long it takes you to accomplish it.

**Attainable:** agreed upon, acceptable, action-oriented
- Assess whether your goal is attainable. Can you actually accomplish it? If not, it is time to narrow the scope (here’s a good place to start a list of things you’ll need to achieve this goal)

**Realistic:** relevant, reasonable, rewarding, results-oriented
- Think about how realistic your goal is. Is it linked in some way to a larger goal or agenda? Is it something you’ll be motivated to do for a reason other than wanting to accomplish it?

**Timely:** time-based, tangible, track-able
- When will you accomplish your goal? Is the goal related to something in the far distant future? Or is it for something happening in 15 minutes? Goals that are set with too much or too little time to achieve them are less likely to be accomplished.

Officer Transition

**Officer Transition Documents**

One of the most important pieces to a successful transition is a thorough set of officer transition notes. The best ways to collect and share notes are by using a binder or electronic files (e.g.: Google Docs or a WISE site). Officer transition notes should include the following information:

- The officer manual for the position/job description/duties and responsibilities
- Copy of the organization’s constitution and bylaws
- Copy of officer responsibilities as stated in the constitution & bylaws
- All current forms relative to the office
- Record of activities over the past year
- Calendar of the past year – including a budget or G/L Report
- Recommendations for the coming year
- Resources relevant to the office (e.g., advisor phone number, copy codes, etc.)
- Other pertinent campus information
- A letter to the next officer with notes, advice, words of encouragement, etc.
- Logins (usernames and passwords) for all social media accounts and other online accounts

At the end of each semester, officers should update and revise the information in their notebook and pass along the notebook to the next incoming officer at a meeting or retreat. If done correctly, the Officer Transition Binder can provide greater longevity to the position and the organization.

**Officer Transition Meeting or Retreat**

Before the Officer Transition Meeting or Retreat, instruct outgoing executive officers to update, add to, and revise their binder. If your current executive officers never received transition materials, it’s never too late to start! Start making one right now! Here’s a hint: Encourage executive members to begin saving things for the transition binder at the beginning of the year. It’s very easy to create a folder on the desktop and save pertinent information. This makes the creation of the binder/electronic files easier at the end of the year. You can also consider scheduling a meeting for reflection and transition material collection at the end of each month or semester.

Here are some questions to guide the officer transition meetings or retreats:

**Outgoing Officer Questions**

- Timeline of major tasks/responsibilities – be sure to include deadlines (use a separate sheet if needed).
- Budget – be sure to indicate typical expenses and sources of income for which you were responsible, budget deadlines, ideas for new income, etc...
- Contact people – with addresses, phone numbers, emails, and areas of responsibility.
- Attach a copy of the completed version of any forms for which you were responsible.
- Activities and Resources Expo/Activities Fair table plans and suggestions.
- Review procedures and rules and recommend any needed change.
- What problems or stumbling blocks did you encounter as an officer?
- How were these problems or stumbling blocks dealt with?
- What aspect(s) of the term went really well?
- What is the best advice you got when you started the position?
- What recommendations do you have for the incoming officer?
- What unfinished business still needs to be addressed?

**Incoming Officer Questions**

- What is the purpose of my office?
- What are my responsibilities?
- How can I improve what the former officer accomplished?
- What new/old programs do I plan to use during my term?
- What are 3 goals I want to accomplish in the short term?
  a. What action items must I accomplish to complete these short term goals?
  b. What is the projected date of completion for these goals?
- What are 3 goals I want to accomplish in the long term?
  a. What action items must I accomplish to complete these long term goals?
  b. What is the projected date of completion for these goals?
- What will be your greatest challenges in holding this office?

Don’t forget to include your advisors in discussions! Advisors are a great resource and they have information to help make officer transition smooth and effective.

**Policies for Student Organizations**

Students and student organizations are expected to comply with published University policies and local, state, and federal laws. For more information about student organizations and the Standards of Conduct, contact the Office of Student Affairs via phone 503-370-6813, or visit their webpage: [http://willamette.edu/offices/conduct/student_rights/](http://willamette.edu/offices/conduct/student_rights/)

**Academic Policy**

Student leaders (roles include: club leaders, elected positions, appointed positions) must maintain a minimum 2.5 GPA and be in good academic standing (not on academic probation or warning).

**Advisors**

All student organizations must have an advisor who is current full time faculty or staff at Willamette. The advisor may not be on leave or sabbatical. If an advisor must end their service, the student organization is responsible for finding a new advisor (and submitting a Leader Advisor Agreement and Student Organization Update Form) to the Office of Student Activities within two weeks of the advisor’s resignation.
Alcohol Policy
The University serves alcohol through an exclusive third party vending contract with Bon Appétit. The complete University Alcohol Policy will be updated soon and available on the Willamette website. Contact <student-activities> to learn about the process for including alcohol at your event. If your student organization would like to serve alcohol at any event, including those off campus, start the process of obtaining approval at least two months in advance as there are many details and logistics involved.

Things to remember:
- You must request approval to serve alcohol for both on and off campus events.
- As of 8/10/17, an alcohol form must be completed ten (10) working days in advance of your event. This form can be found though the service center or through the Service Center’s website.
- Security will be required at your event (number of guards depends on event).
- Alcohol availability cannot be mentioned or implied in publicity for the event.
- Alcohol use or consumption is not acceptable as the main focus of an event.
- No student body fees (i.e. ASWU, Club Dues, Student Bar Association, and ASA, etc.) can be used to purchase or contract alcohol for an event.
- Food items and appealing non-alcoholic beverages must be prominently displayed and available for the duration of the event.
- Entrances and exits of facilities where alcohol is being served must be monitored. A beer garden, or special arrangements, will be required if underage persons will also be attending the event.
- Willamette University faculty, staff, or students may need to produce Willamette ID to verify their status.
- Alcohol may only be served in approved locations. In instances where a registered event is only utilizing a portion (i.e., room) of a building, the serving and consumption of alcohol must be confined to the specific registered or designated area (i.e., room).
- Government-issued ID required (21+) to drink alcohol.

All Campus Emails
Student organizations that wish to send an email to the entire student community should be aware that access to these mail groups is intentionally limited. Student involvement does not send out emails on behalf of student organizations. Due to the nature of their service to the entire student body Willamette Events Board (WEB) and the Associated Students of Willamette University (ASWU) have access to the class mail groups. Contact the Office of Student Activities to brainstorm alternative methods of outreach.

Contracts
Students are not permitted to sign contracts on behalf of their student organization or the university. Student organization advisors should facilitate the contract process, but not sign it. Only Designated Signatory Authorities may sign contracts on behalf of the university. To start a contract approval process, please contact the Office of Student Activities <student-activities@willamette.edu>. All vendors, regardless of whether they are paid to perform a service (e.g., lecture, musical performance, etc.), must complete a Willamette contract or rider (see forms section) and W9 federal tax form. Contracts must be submitted for review/approval at least 30 days before the event/activity.

Food
Any event requiring food or beverage service held on campus will be contracted through our on-site catering company Bon Appétit. There are certain circumstances in which groups may choose to self-cater their event. These circumstances include:
- Student organization functions for students, faculty or staff of Willamette University that do not include any participation of the outside community (prior notification given to Bon Appétit required).
- Potluck celebrations for groups of less than 25 attendees.
- Student organization bake sales (see fundraising policies on page 26-27).
- Ordered take out such as pizza or late night convenience foods.
- Note: external catering is not allowed.

If your student organization would like to self-cater, as defined above, you must get written approval from Bon Appétit a minimum of one week prior to the event. Also, there must be a certain number of your members certified to handle food through Marion County Health Services present at the event. For more information on how to obtain certification, see the fundraising section (page 26-27). Contact <catering> or 503-370-6005 to request self-catering.

Order catering when you make your room reservation (contact <student-activities> to request a room reservation). The catering menu is available online at http://willamette.cafebonappetit.com/catering/. Bon Appétit Catering will also customize event menus based on your budget and needs. Requests must be made at least 2 weeks in advance.

Hazing
Hazing is defined as any activity expected of someone joining or participating in a group that humiliates, degrades, abuses or endangers a person, regardless of the person’s willingness to participate. All acts of hazing by any individual student or University student club, group, organization or team and any of its members or alumni are prohibited. The express or implied consent of the victim will not be a defense against hazing. Apathy or acquiescence in the presence of hazing is not a neutral act but a violation of the hazing policy.
The University may take disciplinary action against a student or student organization when the student or student organization’s alleged behavior can reasonably be held to engage or attempt to engage in any actions that the University defines as hazing. The University may take disciplinary action against a student organization when the alleged violation may reasonably be held to be a collective act of that organization.

Retaliating directly or indirectly against a person who has in good faith filed, supported, or participated in an investigation of a complaint of hazing as defined above is prohibited. Retaliation includes but is not limited to ostracizing the person, pressuring the person to drop or not support the complaint or provide false or misleading information, or otherwise engaging in conduct that may reasonably be perceived to affect adversely that person’s educational, living, or work environment. Depending on the circumstances, retaliation may also be unlawful, whether or not the complaint is ultimately found to have merit.

To report hazing contact the Office of Student Affairs at 503-370-6813. For more information visit the Student Rights and Responsibilities webpage: www.willamette.edu/offices/conduct/student_rights/

Insurance
The University insurance covers most official Willamette University events. Events that bring a large number of visitors to campus (including bands) or have higher risk activities (such as inflatables, brining vendors to campus eg: a fair or festival, speakers, performers, physical games/activities, etc.) may require the purchase of special event insurance. For more information, contact the Office of Student Activities at <student-activities>.

Non-Discrimination Policy
Willamette University opposes discrimination in the recruitment and hiring of students and graduates based on race, color, religion, sex, national origin, marital status, veteran status, actual or perceived sexual orientation, gender identity, gender expression, or status with regard to pregnancy, disability or age. The University will not allow its facilities or services to be used by an organization that practices unlawful discrimination or whose employment practices violate the University’s equal opportunity policy.

Any complaints concerning practices by employers during the recruitment and hiring process that are inconsistent with the terms of this policy should be reported to the Dean of the appropriate graduate school of the University or the Dean of Student Affairs who will investigate by following a procedure developed within each school.

The University has instructed each Career Center to obtain a signed copy of the University’s non-discrimination policy from each organization interviewing on campus as an indication of a willingness to comply with the University’s policy.

Willamette University’s established points of initial contact for community members (students, faculty and staff) to use in reporting any incidents of discrimination that they observe or experience are available at the following link: willamette.edu/offices/hr/policies/NonDiscTitleIX/contacts. Relevant university policies may be found at: willamette.edu/offices/hr/policies.

Complaints of student-to-student discrimination or harassment will be handled through the Student Rights and Responsibilities process. For additional information regarding Willamette University Institution-Wide Policy regarding Harassment refer to: willamette.edu/dept/hr.

Anyone on campus may confidentially report a bias-related incident via the online Bias Report Form: https://secure.willamette.edu/cgi-bin/datastore.cgi/biasreport

Security
An event could require hiring contracted security officers at events where alcohol is served, a significant number of off campus guests are invited, 200 people or more are expected, a controversial topic or speaker is planned, or for other reasons. Security officers are arranged by the Office of Campus Safety <safety> or 503-370-6911, with a minimum cost of $76 per security officer ($19 per hour, 4 hour minimum).

Scheduling
Willamette University has a limited number of venues and resources for events, and an unlimited demand. Student groups have the privilege of using any WU on-campus venue free of charge for their activities, in accordance with University policies. Rooms can be scheduled through the EMS (https://emsweb.willamette.edu/Ems/WebApp/Default.aspx). All students have access to the “Student Organization Event Proposal” form to submit events. All services (space, facilities, catering, and technology) must be input at the time of request. In order to qualify as a student organization activity, the majority of the student organization membership must be present throughout the duration of the activity. If your organization wishes to bring a non-university organization on to campus, please contact Student Activities.

A note about non-University organizations: Permitting a non-University individual or organization to use University space/facilities and services under the guise that the activity is a University-sponsored program is called “fronting”, and is against University policy.

The Willamette University Space Use Policy can be found in full at willamette.edu/offices/scheduling/policies and select the link for “Willamette University Space Use Policy”.

Student Organization Handbook 2018-2019
Page 13
**Showing Visual Media (movies, television, sporting events, etc.)**

When you buy, rent, or borrow a recording of a movie (or any other audiovisual work, which can include television shows and some sporting events**) that is made by someone else, you normally obtain only the copy, and not the underlying copyright rights to that movie. You are free to watch the movie yourself, but, beyond that, your rights are quite limited by law. In particular you do not have the right to show the movie to “the public”. In most cases, a public showing requires a separate “public performance” license from the copyright owner.

To determine whether you need a license, you must figure out if your plans constitute a “public performance”, and, if so, whether there are any exceptions that would allow you to proceed without a license.

**Is it a “public performance”?**

Showing a movie is considered to be a “public performance” if either of the following is true:

- You will be showing the movie to people other than members of your family or a small group of your friends.
- You will be showing the movie in a place that is open to people other than members of your family or a small group of your friends (for example: a classroom, an auditorium, or a campus commons), whether or not any such people attend.

(Generally speaking, showing a movie in your home or residence hall room will not constitute a “public performance”, as long as you limit attendance to family and friends. Most other showings will constitute “public performances”.)

**Is there an applicable exception to the license agreement?**

Even if your proposed showing will constitute a “public performance”, you will not need to obtain a license if any of the following are true:

- You will show the movie in the course of “face-to-face teaching activities” (that is, not through a course management system, such as WISE, or other forms of electronic transmission) that will take place in a classroom or similar place devoted to instruction (that is, not in an auditorium or other public venue, unless it is being used for, and restricted to, participants in teaching the teaching activities), AND
- You have a legitimate copy of the movie (which, in general, does not include one you have recorded yourself from a broadcast).

Your copy of the movie came with an express license authorizing the particular manner of showing. (For example, some educational movies, such as those purchased directly from California Newsreel at the “institutional” price, comes with licenses to show the movies for certain noncommercial institutional purposes.)

The movie you wish to show is in the “public domain”. (Determining whether a movie is in the public domain can be difficult, and even movies that are quite old can still be protected by copyright. The Public Domain Movie Database publishes a list of movies it believes to be in the public domain, but it is neither complete nor authoritative).

**Note**, however, that there is no general “educational”, “nonprofit”, or “free of charge” exception. Even a showing that is all three of those things will require a license if it constitutes a “public performance” and does not fall within one of the exceptions listed above. Thus, most showings outside of the class context will require licenses. If you do need a “public performance” license (or need help determining if your event is a “public performance”), contact the Office of Student Activities. We can help you to:

- Rent the movie directly from a distributor that is authorized to grant such licenses, such as Swank Motion Pictures or Criterion Pictures USA. Student Activities has contracts with these (and other) distributors and can help you quickly determine the licensing fee and availability of the movie that you’d like to show.
- Contact the copyright holder (generally the studio) directly

In most cases, you will be eligible for a “non-theatrical” public performance license, which is considerably cheaper than what a commercial cinema must pay. Still, the cost is likely to be at least several hundred dollars (and sometimes over one thousand dollars for a new release movie). This might seem unreasonable, but keep in mind that inability or unwillingness to pay is not a valid defense to copyright infringement lawsuit. Student organizations showing films for entertainment are responsible for paying licensing fees and any royalties associated with the film.

If you have any questions about movie licenses or copyright law, please contact the Office of Student Activities.

**Final notes:** *In reading these materials, please keep in mind that they do not constitute, and should not be considered substitute for, specific legal advice. The resolution of legal issues frequently hinges on slight changes in the facts and circumstances, and your particular situation may be different from those described in these materials. If you have questions about your situation, contact Student Activities.

**Many sports organizations have copyrighted and trademarked their team names, game or event names, and the rights to show live or pre-recorded sporting events in public places. If you have questions about this, contact the Office of Student Activities.**

**Social Media**

Willamette University has a set of guidelines for social media practices and conduct. If your student organization has a social media account, please make sure you familiarize yourself with these guidelines. For more information, you can contact <social-media>.

**Account Continuity**

In order to ensure that student organization social media accounts continue past the leadership team’s graduation, it is imperative that the advisor of the organization have administrative access to all accounts. Your advisor should know the username and password for all Facebook, Instagram,
Snapchat, etc. accounts to ensure those accounts can transition each year. Student Activities will ask for your social media manager contact information as part of annual registration.

Copyright, Fair Use and Public Domain

- General rules for copyright
  - Unless you have explicit, written permission from the copyright holder:
    - Do not use copyrighted images, videos, music or text outside of the classroom.
    - Do not use copyrighted material on the university’s website, including on the calendar and in the Bearcat Bulletin.
    - Do not use copyrighted material on social media.
    - Providing attribution or credit to a source is not a substitute for obtaining permission.

- Fair use
  - You may use copyrighted materials only for educational purposes, within the walls of a classroom.
  - You may use copyrighted materials for a limited and transformative purpose, such as commentary, criticism and parody.
  - If you are sharing or storing copyrighted materials online for classroom use, the materials must be hosted on the university’s website behind the login, such as on WISE.
  - Once you leave the confines of the classroom or the password-protected sections of the website, you have a more difficult time claiming fair use.
  - More information on fair use: http://fairuse.stanford.edu/

- Public domain
  - You may use images, texts and recordings in a public forum if the copyright of the material has expired. You are responsible for doing the appropriate research to confirm material is in public domain.

- Resources for finding public domain materials and checking copyright
  - https://search.creativecommons.org/
  - http://thestocks.im/
  - http://freemusicarchive.org/
  - Contact University Communications if you are unable to determine whether you have permission to use something at 503-370-6667 or <comm-info>

- University policies related to copyright
  - When posting on social media and the university’s website, Willamette students and employees will observe the university’s policies concerning copyright and intellectual property.
    - Intellectual Property Rights Policy: http://willamette.edu/offices/policies/ip/
    - Copyright policies: http://willamette.edu/offices/policies/copyright.html

Title IX
Title IX requires that all colleges and universities make efforts to prevent sexual violence and offer support to survivors. Many Willamette campus departments, student groups, and community partners collaborate in these endeavors. More information can be found at willamette.edu/sexualmisconduct/

Travel
In order to serve as a driver for travel on any University-sponsored trip, whether it is in a University owned or Enterprise owned, or in a personal vehicle, a person must meet the following qualifications:

- Be a current Willamette University employee or student.
- Possess a valid driver’s license.
- Pass the online training test, available at willamette.edu/offices/safety/parking/safedriver/
- Possess a driver’s record that meets Willamette’s requirements (monitored by Campus Safety). Checking the driving record can take up to 7 days, so plan accordingly.

Private Vehicle
Private vehicle use is discouraged. If it is necessary to use a private vehicle for University sponsored trips, a valid driver’s license, proof of insurance, and completed Trip Information Form & Passenger List must be submitted to Campus Safety during regular business hours (Monday-Friday, 8:00am-5:00pm).

Enterprise
All student organizations that are seeking vans to reserve for university sponsored trips are required to rent vans through Enterprise. Zachery Cardoso <zcardoso> is able to reserve vans for all club leaders and participants once all necessary paperwork is completed for the trip (Trip Form, insurance/driver's license copy is given to Campus Safety, passing of the online training test, etc.). Do not reserve a vehicle without consulting Zachery Cardoso first.
Considered needing waivers are those that have some sort of risk or liability. For example:

Events in the past that have required waivers may be required for your event. To determine if a waiver is needed, contact the Office of Student Activities. Events that could be considered needing waivers are those that have some sort of risk or liability. For example: events in the past that have required waivers include an ice skating rink, Human Mario Kart day, outdoor programs, etc. 

Insurance
Enterprise insurance covers only Enterprise owned, leased or rented vehicles driven by an authorized driver; **it does not cover personal vehicles or accidents and injuries that result from the use of a personal vehicle.** The vehicle owner’s insurance is the primary coverage for any accident or injury related to, or involved with, the use of their vehicle, even if it is being used for a purpose that supports the University.

Trip Information Form and Passenger List
The Trip Information Form (which includes a complete and accurate passenger list) is required for all off campus trips outside of Salem. The form is initiated online (willamette.edu/offices/safety) and emailed to Campus Safety. If the advisor or coach is not accompanying the students on the trip, they will select a student to serve as the Trip Leader. Any deviations from the original trip plan must be reported to Campus Safety immediately via email or by phone.

For weekend trips, the Trip Form must be submitted by 3:00pm on the Thursday prior to the trip. Trips that include travel to and/or through wilderness areas, mountain ranges, or inclement weather require the use of a transponder or satellite phone. This equipment may be checked out at Campus Safety upon completion of the Trip Form.

Pre-Departure Trip Meeting
The Trip Leader will clearly communicate expectations of student participants while on the trip. The following are recommended best practices to be covered when communicating the expectations.

1. Seat belt usage is required at all times when traveling in the vehicles.
2. Participants should carry little cash and leave valuables at home.
3. Trip Leader has authority to return a participant home at their own expense in the event of misconduct or medical emergency.
4. The policies contained within the Willamette Selected Policies Manual are in effect and enforced—alcohol, drugs, conduct, sexual harassment, etc.
5. Students should avoid going anywhere without another person (use the “buddy system”).
6. Curfew for overnight trips (recommended, but coach/advisor’s discretion).
7. Student participants shall sign appropriate waivers (contact Office of Student Activities to obtain an appropriate waiver).
8. Decision on whether to travel in bad weather is not influenced by class schedules for the next day or funding for lodging from ASWU.
9. Student participants should carry medical insurance information with them and wear or carry medical alert bracelets for serious allergies or unique medical conditions. In the case of athletic teams or other groups that travel regularly, the advisor or coach should carry this information as well.
10. Inform student participants of emergency procedures should an accident or student injury occurs. At this time, a back-up Trip Leader will be selected in case the Trip Leader is unable to enact these procedures during the trip.

General Travel Best Practices
1. Maps are obtained and travel routes are determined before the trip.
2. No driver should drive more than three (3) hours per shift and each driver should take at least a two (2) hour break between driving shifts.
3. Travel should be interrupted, postponed, or cancelled if the schedule does not allow adequate rest for the driver(s), there is bad weather, or the budget is inadequate for overnight accommodations when needed.
4. Groups are not permitted to travel or return to campus after 1:00 am without prior approval of the department head (e.g., Director of Student Activities, Director of Athletics, Department Chair, etc.).
5. For any damages that occur to the vehicle while on a trip with an Enterprise vehicle, contact them as soon as possible. Their phone number is 1-800-307-6666.

Student Travel Accident & Emergency Procedures
All accidents are to be reported to Campus Safety. In case of a serious accident or student injury, the Trip Leader enacts the following emergency procedures. If the Trip Leader is unable to carry out this process, the student captain or Trip Leader’s designee will take the place of the Trip Leader.

1. Trip Leader calls appropriate emergency number, probably 911.
2. Trip Leader then contacts Campus Safety 503-370-6911 (and Enterprise, if applicable).
3. All students involved may be taken to the nearest hospital for a medical assessment before being released. Students who claim to be uninjured will be required to be evaluated by Willamette Emergency Medical Services (WEMS) staff upon return to campus. Campus Safety may assist with transport if the involved vehicle is not drivable.
4. Once the students have officially been released from the hospital, or if they refuse care, Campus Safety officers or assigned University personnel will escort each student back to campus and their residence hall.

Waivers
Waivers may be required for your event. To determine if a waiver is needed, contact the Office of Student Activities. Events that could be considered needing waivers are those that have some sort of risk or liability. For example: events in the past that have required waivers include an ice skating rink, Human Mario Kart day, outdoor programs, etc.
Resources for Student Organizations

ASWU Sound

ASWU owns a sound system that can be reserved. Requests may be made online at http://willamette.edu/org/aswusound/index.html. From there, follow the 'request service' link. Once the form is submitted, you will receive a confirmation email from the ASWU Sound Manager, Denise Diaz <dadiaz>, usually within 24 hours.

All ASWU-affiliated student organizations may use ASWU Sound services free of charge.

For non-affiliated groups/individuals, ASWU Sound charges the following fees:

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Cost for a three-hour event</th>
<th>Additional Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Performer</td>
<td>$225</td>
<td>$50</td>
</tr>
<tr>
<td>Dance</td>
<td>$150</td>
<td>$20</td>
</tr>
<tr>
<td>Open Mic</td>
<td>$125</td>
<td>$20</td>
</tr>
<tr>
<td>Background Music w/Mic</td>
<td>$80</td>
<td>$10</td>
</tr>
<tr>
<td>Background Music</td>
<td>$70</td>
<td>$10</td>
</tr>
<tr>
<td>Public Speaker</td>
<td>$60</td>
<td>$10</td>
</tr>
</tbody>
</table>

Additional Fees

<table>
<thead>
<tr>
<th>Event</th>
<th>Additional Half Hour</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event in Kaneko</td>
<td>$100</td>
</tr>
<tr>
<td>Off campus fee (includes van rental)</td>
<td>$100</td>
</tr>
<tr>
<td>Late request fee (requests made less than a week before the event)</td>
<td>$50</td>
</tr>
</tbody>
</table>

ASWU Stage

The ASWU Stage is available to any student organization that requests it. Contact Facilities <aperez> in Facilities Support for more specific stage information and to make reservations. Requests to use the ASWU stage must be received at least 1 week in advance of the setup date.

There are 24 riser sections, each section is 4’x8’. The maximum size of the stage depends on how the sections are arranged (20x32, 16x36, 16x40, 16x44, 24x32, and 16x48). The available heights are 12”, 22”, and 32” (many indoor locations have ceilings too low for the 32” legs).

Student volunteers are needed to load the stage into the truck, unload it at its destination, and set it up. The same crew is needed again immediately following the event to disassemble the stage and move it back to storage. Up to 6 able-bodied individuals who are comfortable with lots of heavy lifting are needed, depending on the size of stage.

Some things to consider when requesting use of the stage:

- It is heavy. Moving the storage carts takes at least 2-6 people and set up can take up to 2 hours depending on where you are setting it up and how many people are there to help.
- It is shared property. When using the stage, keep it clean and in its original condition. After you are done using it, clean off the top with a broom so it is clean for the next group who uses it.
- To use the stage for an outdoor event, the location must first be approved by Facilities and by Scheduling. The location must be level and accessible by a vehicle.
- Use of the stage for dance groups is strongly discouraged. The stage is not designed for dance.
- If the stage is outside overnight, the group sponsoring the event must provide security.
- Depending on the location and type of event, the tallest size of stage legs may not be appropriate.
- It cannot be set up in Montag Den; it can only be set up in the Cat Cavern.

Email

Club President and Club Treasurer Mail groups

Registered student organizations have access to the <clubpres> and <clubtreas> mail groups administered by the Office of Student Activities. New club presidents and treasurers are added at the time of registration and re-registration. These mail groups are to be used only for receiving messages, not for sending. If you would like to change club contact information for either of these mail groups, contact the Office of Student Activities at <student-activities> and complete the Student Organization Update Form available online at (http://willamette.edu/offices/osa/orgs/index.html).

@willamette.edu Mail Groups

Registered student organizations may already have @willamette.edu mail groups or they may want to create one. Groups are managed by advisors and/or student organization leaders. If your organization does not have a mail group but would like to create one, you can request one from the “View and Edit Mail groups” tab on your internal Willamette webpage (you scroll to the bottom of the page and click “Request a new mail group”). If your organization has existing mail groups, a current mail group owner (this may be an advisor or existing organization leader) can add
you as an owner of the group. If you are unable to contact an existing owner, please contact the WITS Help Desk at <wits> or 503-370-6767 or visit them in Smullin Hall.

Fire Pits
If your organization would like to use a fire pit as part of your event, they can be rented from the Outdoor Program in the Montag Center. While you can reserve the fire pit from the Outdoor Program, please also contact Campus Safety at 503-370-6911 or <safety> to inform them of the use of fire pits.

Printing
All printing will go through the Print and Design Center located in University Services Building. Print Design provides creative, flexible, and efficient digital color printing services using specialized production equipment and variable data software. These services include printing of: brochures, booklets, calendars, flyers, invitations, newsletters, posters, postcards, scanning into PDF and OCR formats, and targeted correspondence. Stop by and visit them in the University Services Building, email at <printdesign> or visit their website at willamette.edu/offices/print_design/. Their prices are also located on the website.

Room Set-up
The Facilities Support department provides room setup in most buildings and outdoor spaces on campus. The University has a limited supply of folding tables and chairs that are provided on a first-come, first-served basis. When you make your scheduling request on EMS, enter your room set-up in the online request form. For larger or complex events, set a time to meet with Facilities at the event location to review plans and goals.

Webpages
Registered student organizations have the ability to have a webpage on the Willamette site. An up-to-date webpage will allow you to update members, inform potential members, and show others what your organization has been up to. Some ideas of what to include on your website are:
- Calendar of upcoming events – including your next meeting
- Mission statement
- Organization’s constitution and by-laws
- Photos
- Contact information of officers and advisor
- Links to related websites

The webpages are a privilege and abuse of the webpage (i.e. inappropriate content, misinformation, personal use) will result in the removal of the webpage. As a general rule, all the common courtesies of publicity apply. To manage, edit, and/or update an organization’s webpage, a member of that organization must complete training which is offered by Web Development. To find out more about trainings and the websites in general, visit willamette.edu/offices/webdev or contact them directly at <webdev> or 503-370-6517.

WITS
Willamette Integrated Technology Services (WITS), located in Smullin Hall, has a wide variety of services available for all students but particularly helpful to student organizations.
- Productions: Graphic Design for Posters, Digital Display Boards, Banners, etc. willamette.edu/wits/sr/index.html
- Multimedia facilities: DIY sound and video recording, graphic design software
- Computers, Projectors, Sound: delivered and set up at events
- Tech support: at your event and while you’re working
- Help Desk: to answer questions and help with mail groups

Publicity
Basics
Below is a list of things to consider before you begin to publicize your events.
- Budget – How much can you realistically spend?
- Audience – Who do you want to reach and how?
- Information – Does your publicity include all important information?
- Resources – What or who are your resources?
- Location – Where will your materials get the most attention?
- Schedule – Do you have enough time to publicize (at least 2-3 weeks before event)?
- Creativity – Is there something new that can be done to publicize?
- Word of mouth – Who can you tell in person about your event? How else can you spread the word using people?
- Responsibility – Who is going to be responsible for coordinating publicity (e.g., design, distribution, clean up, etc.)?

Make sure to include the information below on all publicity:
- Name of attraction or event
- Date of event
• Time: beginning and ending
• Location of event
• Admission price (even if it’s free)
• Deadlines, if applicable
• Contact information of the sponsoring organization, email and phone only
• Any co-sponsoring organization names and/or logo(s)
• Accessibility Statement: "If you are in need of disability accommodation for this event, please contact the Office of Equity, Diversity, and Inclusion at 503-370-6195."

Policies
Following are some policies for posting publicity on campus. If a student or student organization wishes to go beyond posting flyers and posters, they must consult a member of the Student Activities staff on the 2nd floor of the University Center for more information and approval.

Every effort will be made to accommodate a special request, as long as the following principles are followed:
• Publicity that contains obscene language or references to alcoholic beverages or illegal substances will not be approved.
• Name of the sponsoring individual or group must be displayed as well as contact information (an email address or phone number).
• A cleaning charge will be assessed if materials are not removed 24 hours after the event (e.g. posters, banners, painting windows, sidewalk chalking, helium balloons, etc.).
• All publicity in residence halls must be approved by the Office of Housing.
• The Office of Student Activities reserves the right to discuss concerns with the individual or group prior to posting the material.

The Poster Distribution Route (on the following page) can be used to guide on-campus poster delivery. Publicity policies for each specific area are listed on the pages following the Poster Distribution Route. The sponsoring organization must remove their own posters after the advertised event is over. Hard (paper) copies of the Poster Distribution Route are available in the Office of Student Activities. Use the Campus Route Poster Distribution guide to help you deliver posters to the areas around campus.
**Poster Distribution Route** *(Updated Spring 2018)*

Posters should be **11”x17”** and must contain event title, location, and contact information (email address or phone number). Posters must also include the following accessibility statement "If you require disability accommodation for this event please contact the office of Equity, Diversity, and Inclusion at 503-370-6195." You are responsible for removing your organization’s posters **24 hours** after the conclusion of your advertised event. If you post anywhere else, you must use blue tape, or you will be held liable for any potential damages from other posting materials. **Updated Spring 2019**

<table>
<thead>
<tr>
<th>Building</th>
<th>Office (if applicable)</th>
<th>Submitting Contact/Instructions; (# of Posters)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Putnam University Center</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bistro (1st floor)</td>
<td>Manager on site (unlimited based on window space)</td>
<td></td>
</tr>
<tr>
<td>OSA (2nd floor)</td>
<td>Zachary Cardoso (2)</td>
<td></td>
</tr>
<tr>
<td>Chaplains (2nd floor)</td>
<td>Office assistant or chaplain (1; either on board or glass)</td>
<td></td>
</tr>
<tr>
<td>Mark O. Hatfield Library</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rogers Music Center</td>
<td>Diane Trevett (RMC 103) (4; includes FAE and FAW)</td>
<td></td>
</tr>
<tr>
<td>Pelton Theatre</td>
<td>Stephen Alexander (Pelton 139) (1)</td>
<td></td>
</tr>
<tr>
<td>Matthews</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing</td>
<td>Stephanie Simpson (37; 1 per RA, inquire for more info)</td>
<td></td>
</tr>
<tr>
<td>Montag Center</td>
<td>Approval not needed; post with blue tape (1)</td>
<td></td>
</tr>
<tr>
<td>Bishop Wellness Center</td>
<td>Approval not needed; post with pins (1; board outside Bishop)</td>
<td></td>
</tr>
<tr>
<td>Ford Hall</td>
<td>Admin. Assistant</td>
<td>Trina Morgan (Ford 317) (2; 3 if including World Lang. Center)</td>
</tr>
<tr>
<td>Smullin/Walton</td>
<td>Admin. Assistant</td>
<td>Tamara Neely (Smullin 108) (1)</td>
</tr>
<tr>
<td>Economics</td>
<td>Pam Smith (Smullin 312) (1)</td>
<td></td>
</tr>
<tr>
<td>Eaton</td>
<td>Sandy Dubuque (Eaton 107) (4)</td>
<td></td>
</tr>
<tr>
<td>Collins Science Center</td>
<td>Amy Schwartz (Collins 202) (1)</td>
<td></td>
</tr>
<tr>
<td>Olin Science Center</td>
<td>Mary Martin (Olin 202) (2)</td>
<td></td>
</tr>
<tr>
<td>Art Building</td>
<td>Ahna Piatt (Art 200) (1)</td>
<td></td>
</tr>
<tr>
<td>Goudy Commons</td>
<td>Approval not needed; post with pins (1; board next dish drop-off)</td>
<td></td>
</tr>
<tr>
<td>Student Center for Equity &amp; Empowerment</td>
<td>Black mailbox to the right of the door (inside) (1)</td>
<td></td>
</tr>
<tr>
<td>Sparks Center</td>
<td>Office Staff (1)</td>
<td></td>
</tr>
<tr>
<td>Kaneko Commons</td>
<td>Front desk (2nd floor of North wing) (2)</td>
<td></td>
</tr>
</tbody>
</table>

**Total:** 32 (excluding residence halls)  
70 (including residence halls)
Publicity Policies Specific to Location

Academic Buildings
To post publicity in academic buildings, the department administrative assistants in each of the buildings must grant approval.

Art Wall
The Art Wall is the three-paneled chalkboard located next to the UC (near Goudy Commons). To reserve a panel (for posting or chalking), please contact the Willamette Events Board President or their advisor (Emily Morris <aemorris>).

Bathroom Stalls
Only the Toilet Paper publication is permitted in the bathroom stalls. Submit a form to have your event/announcement in the Toilet Paper at (http://willamette.edu/offices/campusrec/toilet-paper/).

Bearcat Bulletin
The Bearcat Bulletin is a weekly newsletter that is distributed to the WU community (students, faculty, and staff) via email. To add an announcement or an event, submit it online (http://willamette.edu/news/bearcat-bulletin/index.html). For more information contact <bearcatbulletin>.

Bistro
Contact the managers at <bistroboss> or 503-370-6900 about their posting policies.

Digital Poster (the big screen in the UC)
The Digital Poster Program (DPP) provides community access to a Willamette Digital Screen. Student organizations may promote sponsored events to the Willamette Community under the following terms:

• All promotions must be formatted for digital display by one of these designated university offices: The Print/Design Center, WITS Production, or the Office of Marketing Communications. Only promotions received from one of the above listed designated offices will be aired. NOTE: Promotions can be created by students and submitted to these locations for formatting only at no charge.
• Digital promotions must include contact information on the poster in order to answer event related questions. Follow publicity policy.
• Only one submission per event will be accepted.
• Size of the graphic should be at 1090 x 1920 pix (Landscape & Portrait).

Events Calendar
Get the word out about your events by putting them on the University Events Calendar (cal.willamette.edu). The Events Calendar is a means to publicize your events to the entire Willamette University community. If everyone uses it, we’ll all be better able to see what is happening and when! For instructions on how to submit an event, go to (http://www.willamette.edu/offices/webdev/calendar/) under “Create a New Event”.

Google Calendar
After events are submitted to the University Events Calendar, they will also be posted to the Willamette Google Calendar. Students may access this calendar through their Willamette email account. Events will be divided into categories (based on type) and can be accessed through the section titled “Other Calendars” (which is located on the left of the page in Google Calendar).

Goudy Commons
Only one flyer per event may be posted on the designated bulletin board.

Grounds
• Upon approval, outside publicity is permitted as long as nothing is attached to the foliage or exterior of buildings.
• The placement of stakes in the ground must be approved by the Grounds Department at 503-370-6143 so as not to damage underground systems.
• Chalking is permitted on sidewalks only and must be at least five feet from the entrance to a campus building.
• Portable sandwich boards are available in the Office of Student Activities on a first-come, first-served basis.

Library Boards
The Office of Student Activities will post flyers and posters, space permitting.

Mail Center
Only registered student organizations can stuff mailboxes. A routing form is available in the Office of Student Activities or the Mail Center.

Residence Halls
Student organizations are encouraged to publicize in residence halls. All postings within campus residences must be approved by the Housing staff. No student or organization is allowed to post their own publicity. Approved publicity is physically posted by Housing staff.
Posters from Housing staff, such as resident advisors and area coordinators, does not need prior approval.

Posters must follow guidelines in Publicity Policy.

Approval Process:

1. **Individuals need to bring or send electronic posters to the Housing office in the Matthews Student Success Hub. Digital copies must be sent to housing@willamette.edu.**
2. The material will be reviewed, and if approved, the Housing and Conferences staff will stamp each poster with the date the poster will be taken down.
3. Posters will be distributed in RA mailboxes.

**Distribution Quantities**
The number of copies an organization provides depends on its publicity needs:

- 14 copies = one/lobby in each residential building (not including 3 sororities).
- 37 copies = one/RA
- If the organization only wants the posters displayed in selected halls, the hall needs to be designated on each poster.

**Service Projects**
Please visit the Office of Community Service-Learning or see the CSL website (http://willamette.edu/offices/csl/index.html) for a variety of community service project resources including the service opportunities database, registration for existing service opportunities, and service hours reporting form.

**Sororities**
If you wish to publicize in the sorority houses (Alpha Chi Omega and Pi Beta Phi), please contact a member of the chapter or chapter president.

**University Center**
Flyers: Flyers may be posted on designated bulletin boards on the 2nd floor, following approval from Zachery Cardoso.

Banners:
- Banners may be hung outside on the UC railings. Poster paper is available in the Office of Student Activities for registered student organizations.
- Banners may be hung inside the UC, but the space is limited and available on a first-come, first-served basis. Use a 78" long piece of banner paper folded in half for a double sided banner.

**Willamette University Logo/Imprint Request**
Willamette University logos, including the bearcat, compass, or University name, printed on any form of publicity, must be approved by Mike Wright <mawright> or 503-370-6885. Request forms are available on the Office of Student Activities website at willamette.edu/offices/osa and must be submitted with a proof of the artwork.

**Money**

**Budget Basics**
A budget is a tool used for planning and controlling the organization's financial resources. A budget does not have to be complex! Your organization will need a budget to request funds from any source, whether it is on campus or not. Establishing a budget assists you in using student funds appropriately and helps determine if you need additional funding. Use the following list to help determine all your expenses for an event.

**Getting Started**
Once the following questions are answered, you are ready to begin preparing your budget.

- What is the time period in which you are working (e.g., one semester, academic year)?
- What does your group want to accomplish?
- What is your group’s top priority?
- How much will what your group wants to accomplish cost?
- From where is the money coming?
- If necessary, what can you cut back on to save money?

**Preparing your Budget**
- Prepare an outline of the organization's planned future activities for the current budget season
- Determine and record available funds (carry over balance from previous year, newly allocated monies, etc.)
- If the event is annual, obtain previous budgets to get an idea of how much was spent on specific items
- Estimate and record expected income and when it will be available (dues, t-shirts, other merchandise sales, fundraisers, etc.)
- Define and prioritize needed expenses (advertising, rentals, printing, supplies, etc.)
• Review, revise, and then assemble into a final budget. Anyone should clearly be able to follow your budget and it should be accessible to all members.

• Have members vote or reach some type of consensus for budget approval

A budget needs to be flexible enough to anticipate unexpected expenses. There should always be a cushion just in case.

**ASWU Funding**

ASWU Senate has ultimate authority over all student fees. They use the ASWU Club Approval and Finance Committee to review all financial requests and make budget recommendations. Any eligible registered student organization may apply for funding from the ASWU Club Approval Finance Committee. **Student organizations must attend a Student Organization Orientation in order to be eligible to receive ASWU funding.** Finance Committee hearings are held three times a semester and notification will be given over the Club President’s and Club Treasurer’s list serves. Any additional ASWU Finance questions can be directed to the ASWU Treasurer at 503-370-6058.

**ASWU Club Approval and Finance Committee**

The ASWU Club Approval and Finance Committee is responsible for both approval of new student organizations as well as drafting a budget of student activity fees. This board is composed of a up to 12 ASWU Senators, with special care taken to ensure that they represent a diverse range of backgrounds, club memberships, and grade levels. Finance Committee reviews the requests for funding by all registered student organizations on campus, and after deliberation, composes a budget designed to meet the interests and needs of as many groups as possible. Finance Committee members abstain from discussion and voting concerning clubs with which they are currently affiliated.

It is advised that you submit a complete Funding Request at the beginning of each semester. But, if your organization does not yet know what its budget requirements will be or thinks of additional events / programming or if unforeseen costs arise, you are able to submit budget requests at our later hearings.

Please speak with the ASWU Treasurer if additional funding is needed between the three hearings.

**Questions the Finance Committee considers when approving requests:**

• What is the benefit to the Willamette student community at-large?

• How does the requested item fit in with the organization’s stated goals and purposes?

• How essential is the requested item for the success and survival of the organization/event?

• Is the item being requested in cooperation with any other organizations, groups, departments, etc.?

• Is the organization utilizing alternative sources of funding for large events?

• Is the requested item a requirement for being part of a national organization?

• Does the organization charge dues?

• Is this a (start-up) capital investment? Will this provide the organization with some self-sufficiency?

• Can/should/is a small admission fee charged to subsidize the costs of an event?

• What inventory (ASWU property) is currently in the hands of your club’s members, and how well has your club preserved and maintained existing inventory purchased with ASWU dollars?

**Budget Hearings**

In addition to reviewing written requests for funding throughout the term, the ASWU Club Approval and Finance Committee is committed to hearing explanations and/or presentations by any group on campus that wishes to explain its budget requests in person. Sending a representative to explain the rationale behind requests helps streamline the finance process and ensures that organizations can receive funding as quickly as possible.

It is important to note that although precedents are general guidelines, sometimes these guidelines will be not be followed by the Finance Committee if the student organizations request is determined to be necessary and prudent for the organizations operations.

It is advised that student organizations seeking funding that is greater than current precedents attend the Finance Committee hearings.

Often, a personal meeting with the Finance Committee is desirable for larger student organizations that submit requests for either very large sums of money for major events and capital expenditures, or a longer list of more moderate expenses. These budget hearings can be very helpful in explaining and addressing issues that cannot be expressed well on an itemized online form.

This year’s initial budget hearing is scheduled to occur during the week of September 24th. Each club can sign up for a 10 minute window, providing 5 minutes of presentation and 5 minutes of question-and-answer with the Finance Committee. The Board will convene after the hearings to draft the budget.
We recommend that club presidents and treasurers attend these meetings, along with any other interested club members. Clubs submitting budget requests later in the semester are also encouraged to come make their case at Finance Committee meetings and/or ASWU Senate meetings.

It is important that club representatives attending Finance Committee hearings come prepared with specific information pertaining to their club’s budget request. The more information that you can provide to Finance Committee, the more confident the Finance Committee will feel in allocating money for your student organization.

**ASWU Funding Requirements**

- Organizations must be officially recognized by the Office of Student Activities in order to have their budget requests considered by the Finance Committee.
- All organizations must send the president and treasurer to attend a Student Organization Orientation in order to receive ASWU funding.
- All organizations must submit an ASWU Funding Request form and an Inventory Disclosure form in order to be considered for funding. These forms are available online and will be distributed by the ASWU Treasurer prior to funding request dates.
- Inventory Disclosure forms will include the item and date of purchase as well as its storage location and contact information for the individual in possession and accountable for that item.
- Everything purchased with ASWU funds is property of ASWU and will be treated as such. Groups in possession of equipment are responsible for preserving those items.
- Organizations must submit an update of inventory items to the ASWU Treasurer when new equipment is purchased.
- All organizations that wish to receive ASWU funding must submit budget requests prior to the hearing, at a date and time which will be announced.
- All requests for books and videos must include exact titles and costs. Please note an Inventory Disclosure form listing the exact titles and storage locations must be completed when purchasing books and videos. Speak with the Office of Student Activities for more information about showing visual media on campus.
- Funding for speakers can be allocated only when tentative dates, locations, and costs are provided. The ASWU Treasurer is authorized to execute the transaction of the allocation only when these qualifications have been finalized.
- Only a current Willamette student, who pays student activity fees, may represent an organization in a Finance Committee hearing.
- The Finance Committee and the ASWU Treasurer can add, amend, or suspend any of the ASWU Funding Requests Guidelines with a majority vote of the Finance Committee.
- ASWU will not directly fund any political candidates (running for an office in their given election timeline) or issue campaigns.

**Current Funding Precedents & Standards** *(Contact the ASWU treasurer for online access to updated precedents As of Fall 2018, ASWU has a working document of precedents.)*

**ASWU Funding Request: Guidelines & Procedures**

**IMPORTANT:**

All Funding Requests are made through a Google Form. If you would like access to utilize these forms, email Sarah Mische at <semische>. This form will also be emailed out to clubs at the appropriate budget times. Please ensure to review the email carefully for all details on how the requests will be made and handled.

Funding Requests must be accompanied by an Inventory Disclosure form to be considered. Please read all of the following instructions before completing the Funding Request form and emailing it to the ASWU Treasurer.

**Details needed for Funding Requests:**

It’s important to have all of the following information ready when filling out the requests. Remember: the more information you can give the Club Approval and Finance Committee, the better.

1. Write the full name of the student organization.
2. State the mission or function of the organization.
3. Provide the names, email addresses, and phone numbers for your club’s president, treasurer, and advisor.
4. Add additional information, such as all funding sources (club dues, co-sponsorship, departmental funds, etc.) outside of ASWU, and any plans for fundraisers. If yours is an especially large program/event and you are only partially requesting funding from ASWU, you are encouraged to provide this information *(as well as what other outside sources of funding you are seeking, dues, fundraising activities)*, in addition to your total budget for the event.
5. Indicate the date of the event, program, or expenditure in which the item is needed. If requesting an item, such as funding for van rental or purchasing items for an event, please just indicate the semester.
6. List each budget item requested. Itemize these requests as much as possible. The more details you give us, the better.
7. Include a brief explanation of the requested items, potential use of the items and their related costs. It is important for the Finance Committee to understand the importance of this item to your club. **When in doubt, provide as much information as possible.**
8. Please indicate the dollar amount requested from ASWU for each budget item.
9. Total the amount requested. Please double-check this number for accuracy.
10. Fill in the “Form Completed By” space below the budget request chart.

**Inventory Disclosure**
All capital and equipment purchased by your club in the past is classified as ASWU property. Likewise, all capital expenditures purchased on the part of your organization during the academic year will be considered ASWU property, and you will accordingly be expected to document its status through inventory disclosure forms.

**STILL IMPORTANT:**
Funding Requests must be accompanied by an Inventory Disclosure form to be considered. Even if your organization has no inventory, fill out the form and leave the itemized section blank. This form also will be included over email.

ASWU Senate has ultimate authority over all student fees. They use the ASWU Club Approval and Finance Committee to review all financial requests and make budget recommendations. Any registered student organization may apply for funding from the ASWU Finance Committee. Finance Committee hearings are held three times a semester and notification will be given over the Club President’s and Club Treasurer’s list serves. Any additional ASWU Finance questions can be directed to the ASWU Treasurer at 503-370-6058.

**Accessing Your Club Accounts**
Each student organization on campus has access to two club accounts; a non-ASWU (21-9Wxxx-2220) account and an ASWU (21-9Wxxx-2210) account. Club presidents and treasurers should monitor their account transactions and balances in each of their accounts throughout the year. Each student organization can appoint two executive members (maximum) who will have access to monitoring the account balances, signing off on purchases, etc. throughout the year. (Typically, these two people are the club/organization’s’ President and Treasurer.

Your accounts may be accessed online via WebAdvisor, using the following instructions:

Once you log in, click on Employees (not WebAdvisor for Current Students)
Then under Financial Information, click on, Budget Selection
   
   **Example:**
   In the Fund cell enter: 21
   In the Unit cell enter: 21
   In the Object cell enter: check the box to sort by: Unit
   Click SUBMIT

The first screen gives you a summary of the account and from there you will be able to click on the amount in the Actual column to see detail activity posted to the account.

**21-9Wxxx-2210 Accounts/Reimbursements (ASWU)**
Willamette University account numbers that begin with 21-9W and end with 2210 contain funds allocated by ASWU for specific student organization activities. These funds are to be spent for the purposes for which they were allocated. Should an organization desire to use funds in a different manner, its leaders must obtain permission from the ASWU Treasurer. Unspent monies are returned to ASWU and reallocated through the financial recycling process. At the end of the fiscal year (May 31), these accounts are zeroed out and returned to the main ASWU fund.

Reimbursements out of these ASWU accounts need to be submitted to the ASWU Treasurer on the 2nd Floor of the UC. Checks are usually processed within 1-2 weeks.

**21-9Wxxx-2220 Accounts/Reimbursements (NON-ASWU)**
Student organizations also have Willamette University accounts for monies obtained from sources other than ASWU. This is the account number that ends with 2220. The funds in this account are used at the discretion of the organizations and its advisor(s) and should further the goals and objectives of the organization. These accounts are not zeroed out at the end of the fiscal year (June 1st - May 31st) nor does the money go into the main ASWU fund. To make any transactions with this account, visit the cashier window in the University Services Building. Be sure that this account is not overdrawn before making new transactions as any debts must be repaid.
**Reading a G/L Report**

See instructions (on previous page) regarding accessing your account. Important information: negative numbers mean a positive balance. See the example below. As a reminder, each student organization is only allowed to have two members have access their club’s G/L account.

![Image of a G/L report]

### Account Number

<table>
<thead>
<tr>
<th>GL Account Description</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLA Cheer Squad : Custodial F-Stu Orgs</td>
<td>21-9W 2220</td>
</tr>
</tbody>
</table>

### Date Range

05/01/15 - 05/31/16

### Reference No.

<table>
<thead>
<tr>
<th>Reference No.</th>
<th>Date</th>
<th>Source</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>C000354654</td>
<td>11/17/15</td>
<td>CR Cash Receipts</td>
<td>Ribbon 4 Hair Bows Cheer Team</td>
<td>20.84</td>
</tr>
<tr>
<td>0000020572</td>
<td>10/09/15</td>
<td>IV Invoices</td>
<td>Cheer Squad Charges</td>
<td>918.30</td>
</tr>
<tr>
<td>&quot;YE-OB&quot;</td>
<td>06/01/15</td>
<td>AA Actual Open Balance</td>
<td>Opening Balance</td>
<td>74.59</td>
</tr>
</tbody>
</table>

### Amount of transaction

- Withdrawal
- Deposit

**Who the money went to or came from**

**Date the transaction**

**Total amount currently available**

(a negative sign after the number indicates a positive balance)
**Using Your Funding: Reimbursements**

Before making a purchase for which you wish to be reimbursed from your ASWU allocation, make sure that there is enough money in your ASWU account to cover the payment. Additionally, be absolutely sure that the Finance Committee, during the last budget meeting, has allocated funding for the specific item or event you are interested in financing. If either of these conditions does not hold true, ASWU will not be able to reimburse you.

If you do not have funds in your ASWU Account to cover your expenses, you can consider using your non-ASWU club account (21-9Wxxx-2220) or you can postpone your purchase and make a request for funding to the ASWU Finance Committee at the next budget hearing.

When you make a purchase for which you hope to be reimbursed, it is crucial that you keep all receipts. The original receipts or invoices need to be turned in to the ASWU office, along with a completed Expense Reimbursement Request Form.

After you provide this documentation to ASWU, please allow approximately one week for us to process your request. The ASWU Treasurer needs to verify that your club has a sufficient balance in the ASWU account to finance the reimbursement, and that the Finance Committee has allocated money in the last budget for the purchase. The ASWU Treasurer will sign your documents and notify you when they are ready for pick up. It is your responsibility to submit the signed Expense Reimbursement Request Form to the Accounting Office.

After submitting these documents to Accounting, expect to get a reimbursement check via your campus mail box in about 1-2 weeks.

A note on paid instructors: some clubs have received ASWU funding for bringing paid instructors to campus to teach lessons in various subjects or hobbies. If your club would like a paid instructor, you must apply through ASWU. In the cases where paid instructors have been granted, a Request for Payment of Instructors needs to be accompanied by a contract for their services (see page 37) and either a 1099 or W-9 tax form, because all of their payments are considered income. All invoices entering the ASWU office for the reimbursement of such individuals must go hand-in-hand with these forms. These forms may be obtained in the Accounting Office in Waller Hall or in the Office of Student Activities. If you have any questions about this process, feel free to contact either ASWU Treasurer or the Accounting Office.

**Transitioning Your Club: Finances**

It is important that club leaders facilitate club leader transitioning from one year to the next, especially when it comes to finances. This does not need to be a lengthy or complex process. Simply showing current balances on accounts and records from previous Funding Requests makes a big impact. It is especially crucial that new leaders understand the current financial situation of their club, such as debts needed to pay off in the following year. It is in the club's best interest to have a binder or electronic documents that are passed down, year to year. This binder could include things like previous budgeting, meeting minutes, contact info of companies used for events, timeline of club events, etc.

Small insights from your experience as a club leader make a difference as well, such as explaining what worked this year and what didn’t, helping new club leaders learn from previous attempts. This will give the new leader some preliminary knowledge to start the year with, allowing the new leader to build off of the momentum that you created rather than starting from the ground floor.

These simple steps will help clubs continue to be successful. This can also be a legacy you leave on your club that will live on for years after you graduate. For more information on club leadership transition, contact <student-activities>.

**Fundraising**

Student organizations are encouraged to organize fundraisers to cover operating expenses, complete projects or programs, and create a small reserve or cushion for future events. Following are listed the specific policies for certain types of fundraising. Keep in mind that the options listed are not the only options for fundraising.

Fundraising must be transactional. Examples may include bake sales, t-shirt sales, plant sales, etc.

Off campus fundraising is defined as any solicitation effort to area businesses or alumni, whether for in-kind (goods or services) or monetary donations. It is important that all off campus fundraising go through the Office of Advancement Strategies and Operations (ASO) (Waller, 3rd Floor) so that the University presents an organized and coordinated fundraising effort to Salem and the surrounding communities.

Student organizations that would like to raise funds must first complete a Sanctioned Student Fundraising Approval Form and submit it to ASO for review and approval. Once approved, if there is not already a gift account for the organization, one will be created. Donors will be required to write checks payable to Willamette University and student organizations will be responsible for depositing these donation checks into their own gift accounts. Donations should be directed to the Gift Processing Coordinator (Waller 3rd Floor) with the account clearly marked.

**Student organizations that would like to raise funds must create a gift account through Advancement Services.** Donors will be required to write checks payable to Willamette University and student organizations will be responsible for depositing these donation checks into their own gift accounts.
Note: student organizations are not permitted to use outside fundraising companies, programs, or websites (such as gofundme.com, Venmo, or others that are similar) to engage in fundraising efforts. These companies require personal information from students and do not comply with University Policy regarding organizational funding.

Using Funds for Philanthropic Events
University funds (including residence hall funds) cannot be used for contributions or sponsorships unless approved by the President or Senior Vice President for Finance and Administration.

Student organizations may use fundraiser proceeds to make contributions or sponsorships, provided that the ultimate source is not from University funds.

Bake Sales
The individuals who prepare and sell the baked goods must obtain food handler cards. These cards are available online by taking a course and passing an exam certified by Marion County Health Services at www.orfoodhandlers.com. There is a $10 fee associated with this course. A copy of the food handler card must be in possession of the individual selling the goods for the duration of the bake sale.

Raffles and Door Prize Drawings
Raffles
Willamette no longer holds a raffle license. Please contact Emily Morris <aemorris> with any questions.

Door Prize Drawings
If you want to have prizes, consider doing a “Door Prize Drawing” fundraiser. A “Door Prize Drawing” means a drawing held by a nonprofit organization (such as your student organization) at a meeting or event of the organization where both the sale of tickets and the drawing(s) occur during the meeting or event and the total value of the prize(s) does not exceed $600. The prize(s) must be given to winner(s) at the same event.

Event Planning 101
Planning an event on campus can be as easy as reserving a space on campus and preparing an agenda, or as complicated as planning a large-scale concert or lecture. Following is a general timeline checklist for planning any event on campus. This list is extensive, but is not necessarily comprehensive. Be sure to make your own timeline and checklist and go over it with your advisor and interested club members.

1. Assess the needs of the campus and consider why you are putting on the event.
   a. Questions for you and your co-organizers:
      • What do you want to achieve by having this program?
      • What are your organizational goals and how will this event help you reach them?
      • What is your budget for the event?
      • What would you consider a successful event?
      • What do you, as the planners, want to get out of this experience?
      • Is there enough time to thoroughly organize, publicize and promote the program so that it will be successful?
      • Is organizing this program worth your members’ time, energy, and money?
      • Do you have enough time, money and energy to organize this program?
      • Why would students want to go to this event?
   b. Questions about past/current programs on campus:
      • Is there a current need or interest in this type of program?
      • Does the program focus on a current or timely “hot topic?”
      • Are other similar programs being offered? If yes, how can you partner or collaborate with them?
      • Has a similar event been held in the recent past? If yes, what was the response? What could be done to make it better?
   c. Questions regarding audience:
      • Who is the target audience?
      • How large is the potential audience?
      • What does the audience want to see or experience with this kind of program?
      • What method of assessment will be used to determine audience expectations (word-of-mouth, web surveys, suggestion box, etc.)?

2. Meet with your student organization advisor, and ensure a plan to keep them updated on your event
   • Your advisor should be involved with the planning process, as they will have experience and input to make the whole process easier and the event a success.

3. Schedule a Space on campus
   • To schedule an event, please use the EMS system. Your request must include catering and room set up needs.

4. Finalize details and sign contracts
   • Your advisor and the Office of Student Activities are the only ones who can facilitate the process of signing a contract. Students and advisors may not sign contracts.
Before your advisor facilitates the contract signing process, go over contract details carefully to make sure your organization can meet all of the demands outlined in the contract, including: audio/visual needs, security, venue, catering, etc.

- A signatory authority must sign the contract; and for student organizations that will be the University Fiscal Officer for Student Affairs.
- In addition to the contract and rider that the performer provides, the performer will need to agree to the terms laid out in the Student Activities Rider.
- A contract must be provided even if you are not paying for services.
- A contract needs to be attached to the check request for the performer to be paid.
- Regardless of the amount, Willamette University is legally obligated to report honorariums (or payment as a gift) to the Internal Revenue Service. Each performer, group, or speaker must have a current 1099 or W9 Form on file with the Accounting Office before payment can be approved. This form is available online at willamette.edu/internal/forms/.

5. Plan publicity
   - As a crucial step in the event planning process, publicity should not wait until the last minute. Refer to the publicity section in this handbook for more tips on how to effectively publicize your event.
   - Add your event to the University Events Calendar through the Student Portal.
     - Reserving the room doesn’t get your event put on the Events Calendar nor does putting an event on the Calendar reserve a room.
     - The calendar helps provide accurate information to the campus community. You are responsible for posting accurate information about your event.

6. Plan to manage risk. If you need help finding answers or following through on any of the below items, contact <student-activities>.
   - **Type of Activity**: Does this event involve physical activity, use of fire, animals, controversial content, alcohol service, or activity that will draw an unruly crowd?
   - **Attendees**: How many attendees do you expect at this event? Will there be minors, people with disabilities, protesters, or VIPs present?
   - **Access**: How will attendees get in and out of the space and will there be an impact on parking, classes, or other university activities? Do we have a back-up location?
   - **Emergency Protocols**: What are the emergency procedures for the space and university? What will you do if an unexpected emergency happens? Who is/can be our emergency responder (does someone know CPR)? Do we need a First Aid kit on site?
   - **Permits**: Do you need permits or other official approvals to carry out your program?
   - **Waivers**: Do you need students to complete/sign a Waiver of Liability, Indemnity Agreement, and Assumption of Risk? (contact the Office of Student Activities for more information).

7. Plan performer’s lodging and transportation
   - If your performer is coming from out of town, their contract might require transportation to and from the airport as well as a nights lodging. For assistance with booking lodging and transportation contact Student Activities at <student-activities>.

8. Request security
   - Depending on the type of event, especially for larger events or events with alcohol, security may be needed to provide a safe environment. Please contact Campus Safety at <safety> or 503-370-6911 to determine if you need security at your event.

9. Request or make payments
   - If your event or performer requires payments make sure you plan ahead and request checks or petty cash in advance.
     - Allow 1-2 weeks to process checks.
     - Remember that all requests for payment using ASWU funds must first go through ASWU Treasurer.

10. Plan program assessment
    - Look back at your goals for the event and discuss how you will get feedback from the audience about whether or not you met your goals. Then, discuss who will solicit and collect this feedback. Plan ahead and create a survey or email to send out immediately after the program. Contact Willamette’s QUAD Center (Quantitative Understanding, Analysis, and Design) for assistance with analyzing quantitative data by joining their group on WISE.

11. Create a detailed day-of-event timeline that you share with all fellow planners and implementers of this program
    - This is an agenda for the day that ensures no details are missed. Having a well laid out plan will make the day and the event enjoyable.
    - This should include who is doing what, where, and when.
    - A contact sheet of important names and phone numbers is also a good idea for quick reference if an issue arises.

12. Have fun
    - Schedule some time to sit and enjoy the program, relax, and enjoy the event.

13. Clean up
    - The event is not over until the last shred of confetti is cleaned up off of the floor. Please respect the University’s shared spaces and clean up after your event.
• Your clean up goal should be to leave the space how you found it.
• Remember to clean up all publicity within 24 hours of the end of the event.

14. Evaluate the event
• Get feedback from the audience, other programmers, the presenter(s) or performer(s), your advisor.
  • For larger events, consider holding a separate meeting with the advisors, officers, and responsible members for the event followed by a larger group discussion.
  • For smaller events, a simple open discussion time during a regular organization meeting may suffice.
• Regardless of the event size, you should always plan to evaluate the attendees to your event in some form or another. This can be a paper evaluation handed out at the event, an email sent requesting feedback, a more formal survey, or questionnaire. The evaluations help planners understand how to make the event better next time it is planned.
• Regardless of how you collect the information, make sure you do something with it! Summarize your findings and use the information for the next event and/or include the suggestions and input into your transition binder.
  • Did the presenter/performer have a positive experience? Do they have any recommendations for future events?
  • What are the planner’s thoughts and recommendations? Make sure to write them down.
    1. Was sufficient time allowed for planning and implementation?
    2. Did the program achieve the goals and objectives?
    3. What went well? What went poorly? What were the challenges?
    4. What should be done next time we do an event that wasn’t done this time?
    5. Did the anticipated audience attend? If no, why not? Who did?
    6. What did the audience think about this program?
    7. What was the cost per head? Was it worth the money for the number of people who attended?

15. Give thanks
• No matter if it is electronic, handwritten, or in-person it is important to thank the people who helped make your event possible!
• Be especially careful to thank any and all volunteers who help you make your event a success.
• Depending on the scope of the work done by those who helped you a small gift in addition to your note (e.g., cookies or gift cards).

16. Add timeline, notes, contracts, and evaluation to transition materials
• Make the organization stronger by keeping all materials in a binder for the next program planner to use as a reference guide.

Forms
The following is information concerning different forms that your student organization will need for planning events, maintaining a budget, etc. All forms can be found online at http://willamette.edu/offices/osa/orgs/index.html. Some things to keep in mind:

• Paper copies of many of these forms are available in the Office of Student Activities.
• Financial forms are available electronically on the office of Accounting’s webpage: willamette.edu/dept/accounting

Please note: when completing forms for financial reimbursement, different accounts require different approval signatures:
• When using an ASWU account, forms must be approved and signed by the ASWU Treasurer
• When using a non-ASWU account, forms must be approved and signed by an executive officer who has G/L (General Ledger) access.

For assistance with any of these forms, contact the Office of Student Activities.