

**CAL POLY
CLUB HANDBOOK**

2011-12

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Introduction

The Cal Poly Club Handbook provides key information to help your club succeed. This handbook is designed to assist your organization with understanding University Policies, identifying resources available through ASI Club Services and obtaining information that will help make your activities function efficiently.

This is not intended to be all-inclusive, and much of the information is in excerpt or abbreviated form. There may be other policies that have not been addressed in this document that organizations must follow. Please note that all organization activities must comply with Campus Administrative Policies, which can be found at <http://policy.calpoly.edu/>

If you have any questions or would like further information on a specific topic, please contact ASI Club Services at 756-5807 or Student Life & Leadership at 756-2476. Both offices are located on the second floor of the University Union.

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

Mission Statements

Associated Students, Inc. (ASI)

The mission of Associated Students, Inc. is to enrich the quality of student life and to complement the educational mission of Cal Poly through shared governance, student employment, student advocacy and a broad spectrum of programming, services and opportunities for leadership and social interaction.

ASI's Role with Clubs

Financial Processing

- Audit and process all requests for purchase orders and checks
- Serve as a liaison between clubs and vendors
- Retain club financial documents
- Process ASI Club Funding applications and reconcile ASI Club Funding

Event Planning

- Process requests for on and off-campus events
- Route contracts for clubs
- Reserve on-campus space for meetings and events
- Provide event planning consultation
- Act as liaison between clubs and other campus entities

Other Resources

- Provide club mailboxes
- Provide training and monthly educations for club officers and advisor(s)
- Coordinate charter renewal process

Student Life & Leadership

The mission of Student Life & Leadership is to advance and encourage the learning and personal development of students as effective leaders and valuable members of the larger community. Programs are integrated into the student's total learning environment, both in and out of the classroom.

Student Life & Leadership's Role with Clubs:

The University, through Student Life & Leadership, is responsible for Cal Poly club oversight, including:

- Assuring that all advisors have proper University affiliation
- Approving contracts
- Annual recognition and approval of all Cal Poly clubs through completion of the Charter renewal process
- Administration of the Judicial Process including hearing coordination
- Initiation of judicial investigations of club violations

Starting a New Cal Poly Club

When a student/group of students have decided to start a new Cal Poly club, the following steps must be followed:

Club

- Research that no other club currently exists with a similar purpose
- Find 8 or more currently enrolled Cal Poly students that are interested in being a part of the organization
- Find a Cal Poly State employee who would be willing to serve as a club's advisor
- Complete a "Petition for University Recognition"
- Complete bylaws using the "Bylaw Template"
- Submit "Petition for University Recognition," bylaws, and a copy of the bylaws on a disc (not mandatory) to ASI Club Services for processing

ASI Club Services

- Verify necessary documents are completed
- Route paperwork to Student Life & Leadership for review

Student Life & Leadership

- Review bylaws and either approve or deny the process to continue
- May contact the club to set up a meeting to discuss the group's purpose

ASI Club Services

- Review bylaws for content and grammar
- Return bylaws to the club for revisions or notify the club that they are now officially recognized by the University and the officers can begin online training

Club

- President, vice president, treasurer, and advisor must complete the online training
- Once training is completed, president is emailed the Charter
- Charter must be completed and submitted to ASI Club Services for processing

ASI Club Services

- Route Charter to SL&L

Student Life & Leadership

- Verify President, Vice President, and Treasurer GPA
- Verify that the advisor is a state employee
- Approve Charter or require Charter changes, and send Charter back to ASI Club Services

ASI Club Services

- Notify Club that changes need to be made to the Charter and return it to the club's mailbox, or if Charter was approved by SL&L, ASI Club Services will update all internal databases
- Notify the Club once the Charter process is complete
- Club is now officially recognized as an active University club, and can begin submitting paperwork

Club Charter Renewal Process

The University, through Student Life & Leadership, officially recognizes Cal Poly clubs based on University standards and requirements (which include a current Charter). ASI is a partner with the University and is charged with administering the day to day operations of clubs.

Online Training

The first step for a club to renew their Charter is to complete a mandatory online training. This training will take approximately 40 minutes to complete, and at the end will have a quiz based on the materials presented. All officers and advisors that take the quiz must answer 80% of the questions correct in order to receive their charter.

- The president, vice president, treasurer and advisor must complete the online training at the beginning of each academic year.
- ASI Club Services will email the president a Charter specific to their organization within five to seven business days of the last officer/advisor completing the online training.
- The president is responsible for entering all relevant information into the Charter. The document must then be printed, signed by all officers and advisor(s) and submitted to ASI Club Services for processing.
- ASI Club Services will verify completeness and forward the Charter to Student Life & Leadership where officers' grades will be checked and advisors' employment with the state will be verified.
- ASI Club Services will notify the president via email when the process is complete.

Annual Charter Renewal

Every fall quarter, the University requires all Cal Poly clubs to renew their Charter. In doing so, the club provides the University with current information including the club's purpose, membership, and contact information for all officers and advisor(s). The Charter also includes a section for officer and advisor(s) signatures. These signatures will be used to verify that those individuals have permission to sign on behalf of their club for the 2011-12 year.

Every club is required to renew it's charter by October 21, 2011, to remain active (access club funds, receive ASI Club Funding, submit E-Plans, etc.) for the 2011-12 academic year.

Please note: The President, Vice President and Treasurer listed on the charter must maintain a minimum overall 2.0 grade point average each academic year, and be in good standing and shall not be on probation of any kind. A grade check will be conducted for the President, Vice President and Treasurer at the end of each academic quarter.

Club Charter

The following information is essential to have in completing the chartering process.

2011-2012 Club Charter

Callout 1: This information will automatically be filled in. (Points to Name, Acronym, Account, Club E-mail, Webpage, Mailbox)

Callout 2: Check the appropriate charter type, affiliation and type(s) (Points to Charter Type, Affiliation, Type(s) sections)

Callout 3: Write in the correct number of active, inactive, and honorary members. (Points to Membership section)

Callout 4: Indicate what club officers want financial authorization (ability to sign PRF's). (Points to checkboxes in the Officer table)

Callout 5: Name, Signature, Initials, Username and Phone Number must be filled in for the President, Vice President, Treasurer, Community service Rep, and Advisor. (Points to the Officer table)

Callout 6: If affiliated with a College, or an academic, honor, or professional student org., the student org. must have College Council Rep signature and the Dean's signature (Points to College Council Rep and Dean's signature fields)

Officer	Name	Signature	Initials	Cal Poly Username	Phone #	Financial Authorization
President						<input checked="" type="checkbox"/>
Vice President						<input checked="" type="checkbox"/>
Secretary						<input checked="" type="checkbox"/>
Treasurer						<input checked="" type="checkbox"/>
Community Service Rep						<input checked="" type="checkbox"/>
Advisor						<input checked="" type="checkbox"/>
Co-Advisor						<input checked="" type="checkbox"/>

For Official Use Only: Student Life and Leadership Authorization

Stephen Lemir: _____ Signature _____ Date _____

Everette Brooks: _____ Signature _____ Date _____

Buttons: Delete & Initials, Received, Club Admin, Grade Check, Club Admin, RCS, Accounting, ASI Edit, Emailed Club, Scanned

Adding to a Charter

Used when a club wishes to add additional officer(s)/advisor(s) to the Charter without removing any current officer(s)/advisor(s). When a club wishes to add to the Charter, they will need to complete the following steps:

- Notify ASI Club Services so that an “Add to Charter” can be sent to the club president.
- Upon the president receiving the Charter he/she will need to sign the Charter and also obtain the signature of the new officer/advisor being added.

- The only signatures that need to be on the Charter are those of the new officers/advisors and the president. The advisor's signature is not required.
- Submit completed "Add to Charter" to ASI Club Services for processing.
- Once the chartering process is completed, the president will be notified.

Please note: the new officers/advisors being added will not be able to sign off on any paperwork until the Charter has been approved by Student Life & Leadership.

The club has the ability to add as many officers to the Charter as needed. Just because the Charter states specific officer titles (i.e. President, Vice President, Secretary, etc.), does not mean that those are the only officer positions the club can have on file. To add another officer position with a different title, the club can cross out the officer titles that do not apply and write in the specific officer names that are relevant.

Replacing a Charter

If a club wishes to remove an officer/advisor from the current Charter, the organization can replace the Charter that is on file with ASI Club Services. This should be done every time a club's officer(s)/advisor(s) change. When a club wishes to replace a Charter, they will need to complete one of the following:

Option One: All officers/advisor(s) complete training

- The new president, vice president, treasurer, and advisor complete the online training, found at <http://www.asi.calpoly.edu/training>.
- Once the trainings have been completed, a "Replace Charter" will be emailed to the club president.
- Upon receiving the Charter, all signatures will need to be obtained, including that of the dean (if necessary).
- Submit completed "Replace Charter" to ASI Club Services for processing.
- Once the chartering process is completed, the president will be notified.

Please note: the new officers/advisors being replaced will not be able to sign off on any paperwork until the Charter has been approved by Student Life & Leadership.

Option Two: New Officer Notifies ASI Club Services

In order to eliminate club officers and advisors, who have already completed the online training, from having to redo it, the club can:

- Notify ASI Club Services once the new officers/advisors have completed the training.
- Once ASI Club Services is notified, a “Replace Charter” will be sent to the president, and signatures of the new officer/advisor will need to be obtained.
- Submit completed “Replace Charter” to ASI Club Services for processing.
- Once the chartering process is completed, the president will be notified.

Please note: the new officers/advisors being replaced will not be able to sign off on any paperwork until the Charter has been approved by Student Life & Leadership.

If your club selects option two, and ASI Club Services is not notified about the need to replace the club’s Charter, a “Replace Charter” will not be sent. When contacting ASI Club Services about the desire to replace the club’s Charter, please provide a list of the new officers and advisor(s) names and positions.

Reminders:

- Please be aware that if your club replaces its officers/advisors during spring quarter, it is highly recommended that the club complete a “Replace Charter” prior to leaving for summer.
 - This will ensure that upon returning from summer, the club can quickly and easily conduct business before the required “2012-2013” Charter can be completed.

Please note: no requests (PRFs, ASI Club Funding, E-Plans, etc.) can be processed until the Charter has been approved. Officers on the previous year's Charter may sign paperwork until either the previous year's Charter expires on **October 21, 2011** or until the 2011-12 Charter is approved.

Club Advisor Requirements

All clubs chartering for the academic year must have an advisor that is a University (state) employee. The advisors employment with the state will be verified by Student Life & Leadership as part of the chartering process.

Co-Advisors

All clubs are encouraged to designate a co-advisor on their Charter who will have signing authority if the other advisor is unavailable. Co-advisors must also be University faculty/staff members. Failure to obtain a co-advisor could result in processing delays in the primary advisor is unavailable for signature.

New for 2011-2012

All clubs who indicate on their Charter that they are affiliated with their College should designate a College Council Representative who will be responsible for attending their College Council's meetings. Please contact your College Council President for meeting information.

In addition, all college affiliated clubs, or clubs recognized as being, "Academic," "Honor," or "Professional," must have the Dean sign off on the Charter. Failure to obtain the appropriate signatures will result in the Charter being returned to the club.

A Community Service Representative position has been added to the 2011-2012 Charter. The responsibility of this position is to organize and manage the service projects for the club. Although this position is not mandatory, Student Life & Leadership

recommends that this position be filled, which will allow them to better assist and promote the organization's service projects.

General Club Information

Updating Bylaws and Changing a Club's Name

When updating bylaws or changing a club's name, begin by picking up a copy of the club's current or past bylaws for reference from ASI Club Services. When changing a club's name, the bylaws must be updated to reflect the name change. To update the bylaws or change a club name, the following must be submitted to ASI Club Services:

- A typed copy of the club's new bylaws (either changed or updated with the club's new name). The bylaws template can be found at asi.calpoly.edu
- A rewritable CD of the bylaws in Microsoft Word (not required, but if submitted cd will be kept on file for future reference.)
- A completed Code or Bylaw Amendment Proposal Name Change form

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

Inactive Clubs

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

Online Club Directory

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

UNIX Account / E-mail Account

Upon request, clubs are given one central UNIX account for a web page, one e-mail account and one entry in the campus directory server that redirects your messages to the e-mail account. To set up these services, print a UNIX account form found at asi.calpoly.edu. Once the form is filled out and the proper signatures are obtained, submit it to ASI Club Services. This information will be forwarded to Cal Poly Information Technology Services, who will then contact the group representative with further information.

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

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

Prohibited Commercial Use:

- Displaying personal items for sale on a web page residing on or transmitted through University resources.
- Displaying commercial advertisements on a web page hosted on University resources.
- Using a Cal Poly account to create and host a web site for a local organization promoting fundraisers and other commercial activities.

- Using a Cal Poly account to operate or conduct non-University related business activities, including financial management, advertising and promotion, correspondence, web sites, etc.

Mailboxes

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

Club Name, Mailbox #

ASI – Epicenter

1 Grand Avenue

San Luis Obispo, CA 93407-0675

Should a package that does not fit in the club's mailbox be delivered to ASI Club Services, the club will be notified via e-mail. If the package is not picked up within two weeks, it will be forwarded to the advisor.

All mailboxes will be cleaned out at the end of each quarter. All mass mailings will be discarded, and any club mail will be forwarded to the advisor.

Mail Services

The use of campus mail delivery services is limited to official University mail and inter-departmental correspondence and may not be used by clubs for mass mailings to faculty and staff.

Under no circumstance are clubs to use the ASI or University Bulk Mail permits for either on or off-campus mailings.

Use of Cal Poly Name and Symbol

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

- Cal Poly
- California Polytechnic State University
- Cal Poly website (i.e clubname@calpoly.edu)
- Cal Poly Abbreviation (CP, Poly)
- Mustangs
- Musty the Mustang Logo

The club Payment Request Form (PRF) includes an additional question pertaining to the use of Cal Poly marks. If the purchases being paid/reimbursed for on the PRF contain the use of any Cal Poly marks, it must be indicated on the PRF and a Student and Internal Request to Use the Cal Poly Marks forms must be completed and submitted to the Cal Poly Licensing and Trademark office (located in the El Corral Bookstore) for approval. For additional questions regarding the Licensing process please contact the Cal Poly Licensing and Trademark Office at 805-756-5306 or visit <http://www.clc.com/>.

Please note: failure to use a properly licensed vendor may lead to suspended club privileges, and not receiving reimbursement for unapproved purchases.

Club Operational Policies

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

All clubs are responsible for adhering to University policies as stated in the Campus Administrative Policy (CAP). CAP includes information on University policies such as alcohol, discrimination, hazing, adherence to bylaws, as well as general club policies.

Club Policies

- Operate within the laws of the State of California and the policies and procedures of the California Polytechnic State University and Associated Students, Inc.
- Carry out all activities in accordance with its bylaws.
- Process all amendments to bylaws through ASI Club Services with final approval granted by the University (Student Life & Leadership).
- Keep all funds in an Associated Students, Inc. account.
- Submit a Charter annually to ASI Club Services.
- Have a faculty/staff advisor approved by the University via the Charter renewal process.
- The President, Vice President and Treasurer listed on the charter must maintain a minimum overall 2.0 grade point average each academic year, and be in good standing and shall not be on probation of any kind. A grade check will be conducted for the President, Vice President and Treasurer at the end of each academic quarter.
- Keep on file with ASI Club Services a current copy of the bylaws of any and all organizations with which the Cal Poly club is affiliated

Equal Access

Cal Poly clubs shall not discriminate either in the content of bylaws or in practice against any person on the basis of race, religion, national origin, ethnicity, color, age, gender, marital status, citizenship, sexual orientation, or disability. The prohibition on membership policies that discriminate on the basis of gender does not apply to social fraternities or sororities, or to other University living groups.

Hazing

Clubs must abide by Section 32050, California State Education Code regarding hazing, which states:

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

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

Alcohol

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

Student Judicial Process

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

Judicial Meeting

The judicial process will be administered through Student Life & Leadership. Club representatives will be notified by phone and/or e-mail concerning the nature of the complaint, specifying the alleged violated University Policy, and arranging a time and place for the judicial meeting. The purpose of the judicial meeting is to obtain information concerning the allegation from representatives of the involved club(s). Legal counsel may not represent the club(s).

A decision will be rendered as soon as possible and will be communicated, in writing, by a designee of Student Life & Leadership to the club's president, advisor, and/or other appropriate individuals. Student Life & Leadership reserves the right to notify any affiliated national organization of hearing decisions.

Club Sanctions

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

Warning: will be issued in writing and kept in the club's permanent file.

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

Suspension: will result in the following:

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

Revocation of Charter/recognition: the University no longer recognizes the club and loses all University rights and privileges on a permanent basis.

Appeals Process

The club has the right to appeal the decision of Student Life & Leadership. The appeal must be submitted to the Vice President for Student Affairs or a designee. The appeal must be in writing, stating why the club feels the decision rendered is not appropriate. Clubs must submit this appeal within ten business days after notification of the decision.

The Vice President for Student Affairs or his/her designee will meet with the parties involved and will render a final decision within ten business days after the meeting. This decision is final and is not subject to further appeal.

Advisors Responsibility to the Club

All advisors should understand that by agreeing to serve as an advisor, they are also assuming certain responsibilities. An effective advisor has a strong belief in the club, a desire to help students succeed, a willingness to share expertise, and a commitment to spend time with the club and its members.

Advisor Roles and Responsibilities Overview

- Being a University representative to a club.
- Provide continuity from year-to-year during transitional periods.
- Help mediate within the group and assist with problems that may arise.
- Serve as a role model.
- Be aware of all club activities.
- Assist in developing the club's short and long-term goals and provide guidance to help them reach those goals.
- Encourage leadership and group development.
- Provide insight and advice for activity planning.
- Oversee the expenditures of the organization, including the planning of the budget, and the monitoring of financial reports.
- Review all distributed material, publicity and official correspondence before distribution.
- Review and approve E-Plans, PRFs, Cash Securities Forms, ASI Club Funding Applications and PayPal Request Forms (other documents do not require the advisors signature, but should be reviewed).
- Receive all club mail at the end of each quarter if it has not already been picked up club officer.

An effective advisor allows students to make decisions and learn from their experiences. While it may be an advisor's first reaction to intervene and fix the mistakes seen, this is not the role of an advisor. The advisor should help the club members benefit from their experiences by using mistakes as teachable moments.

Conversely, while it may be easy to sit back and say "everything is a learning experience, I won't interfere with what they say or do," it is the advisor's responsibility to ensure that students understand what consequences could result from the decisions they make. In other words, the advisor should be proactive when a potentially controversial or policy-related situation or decision is discussed.

Part of the educational experience student's gain in a leadership position is how to manage a budget and maintain fiscal records. The advisor's primary role regarding finances will be to monitor expenses, provide feedback on the budget, and authorize Payment Requests Forms. The advisor signature (in addition to a student officer signature) signifies that club money is being spent appropriately.

The advisor provides an extra security level to protect the integrity of club funds. All PRFs must have the advisor's signature in order to be processed. If an advisor's signature on a PRF appears different than the signature on the club's Charter, payment processing will be delayed until the signature can be verified. ASI has received a mandate from the University to safeguard all club funds, so a high level of care is given to every club transaction.

Review Financial Records

- Carefully review and authorize all Payment Requests Forms (PRFs) and accompanying original and itemized receipts and invoices. **Club funds may not be spent on alcohol or gift cards to stores that sell alcohol.**

- Remind officers to request Purchase Orders prior to confirming orders with vendors whenever possible.

Be Involved with Events

- Advise during event planning.
- Review and authorize E-Plans. Failure to approve E-Plans within the proper timelines will result in the denial of the request.
- Review published materials and advertising before they are distributed.
- Review all travel documents (including air and vehicle travel) for accuracy and compliance.

Please note: advisors cannot sign contracts or agreements on behalf of the club (e.g. with restaurants, service vendors, etc.). All contracts must be submitted to ASI Club Services for processing.

Be Attentive to Details

- Learn about pertinent University policies and procedures, and advise officers on adhering to them, including policies regarding alcohol, contracts, and purchasing
- Review all official correspondence before distribution, and retain a copy for the club's records

Reporting Disclosed Information (Clery Act)

The Clery Act is a federal law that mandates crime statistic disclosure, publication of campus security policies and the posting of a crime log for the University. The Annual Security Report provides alcohol/other drug resources, offers information about sexual assault, and addresses other safety issues affecting our community. The Clery Act also contains a timely warning policy mechanism to ensure that students, staff and faculty know about serious, on-going threats to safety on campus.

Club Advisors have a mandated reporting responsibility. If a student reports or discloses a crime to their advisor, the advisor is expected to file a confidential report with the University Police Department that contains demographic information about the crime. The student's name and personal identification are not a part of the report.

If the advisor becomes aware of a missing or potentially missing person, he/she is mandated to report the incident to the University Police Department **without delay**. Crime may be reported by contacting the on-duty Police Dispatcher at (805)756-2281. **In the event of an emergency, dial 9-1-1.** Students can also make anonymous reports of crimes by text or by e-mail to: calpoly@tipnow.org.

For any questions regarding the Clery Act or reporting of crimes at Cal Poly, please contact Police Records Manager Fred Mills at fmills@calpoly.edu or by calling (805)756-6685.

Examples of crimes that must be reported:

- A student talks to his advisor in confidence about his roommate who recently stole his bicycle.
- A student talks to her advisor in confidence about a party she attended she was drugged and sexually assaulted.
- A student talks to her advisor in confidence about her house being broken in to and her laptop being stolen.

Club's Responsibility to the Advisor

It is each club's responsibility to utilize its advisor and maintain open communication. These responsibilities are shared with clubs so they know how to best work with the advisor(s).

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

Club Financial Processes and Procedures

Club Accounts

All recognized Cal Poly clubs, with the exception of Independent Student Organizations (ISOs) have a financial account with ASI. Statements, donations, and all check and purchase order requests are processed by ASI Club Services.

Off-Campus Accounts

Clubs are not permitted to have off-campus bank accounts. University policy requires that recognized clubs deposit all funds with ASI. The purpose of this policy is to ensure the integrity of the funds from year to year. Requests for checks or transfers to any club account held off-campus will not be processed. Clubs found to have off-campus accounts are subject to disciplinary action.

Depositing Into a Club Account

This section applies to all deposits **except donations** – please see “Gift and Donation Processing” for appropriate donation procedures.

To deposit money into a club’s account, an **officer of the club that is listed on the current Charter** must go directly to the CHASE bank branch located on the first floor of the University Union. General club members cannot deposit on behalf of their organization.

ASI works with CHASE to maintain Cal Poly club accounts. Club deposits are accepted at CHASE Monday – Friday: 9a.m.-6p.m. and Saturday: 9a.m. – 2p.m., unless otherwise posted. The Cal Poly CHASE branch is the only CHASE Bank that accepts club deposits.

Separation of Duties

Separation of duties must be maintained when cash is received and processed. No single

person should have complete control over the entire process of receiving funds, preparing the bank deposit and verifying the deposit. Separation of Duties requires that two (2) or more qualified and authorized persons are involved in the process of collection, handling, depositing, and accounting processes for all cash/check transactions. The person collecting cash, issuing receipts, and preparing the deposit should be someone other than the person verifying the deposit.

Preparing Deposits

Accountability for and documentation of the custody of cash and checks must be continually maintained when preparing club deposits.

- Deposits should be validated and prepared under dual custody (actions requiring approval by two persons, each being held accountable).
- The validation and preparation of deposits should be done in a non-public, safe, and secure location.
- A report of cash collections signed by the preparer should be kept for your club's records.
- After making a deposit, your club should retain all carbon copies of the deposit slip.

Deposits should be made the same day as collected (if possible), or a minimum of the following business day.

- Deposit slips can be found outside of the Epicenter, at the ASI Club Services Self Service Station or at CHASE and should be completed prior to approaching the teller.
- Amounts should be filled in by denomination on the left hand side, and the club's name and account number filled out on the right.
- Write a general description of the type of income being deposited, such as "dues, t-shirt sales, fundraising." The description (up to 20 characters) will appear on a transaction report that officers can request from ASI Club Services.
- Place like bills together and roll coins in coin wrappers.

- Make copies of all checks for your clubs record.
- Sort checks by dollar amount.
- Stamp all checks prior to making a deposit. ASI Club Services and CHASE bank have an endorsement stamp available for club use.
- Depositors are required to stay with the teller during the entire fund verification process.

Physical Security

All cash and checks should be physically protected from loss at all times. Cash and checks should be locked in a secure receptacle at all times. If your club will be depositing large sums of money (over \$2,000) it is highly recommended to have two officers accompany the money to be deposited for security reasons. If necessary, University Police are available to escort an officer to make the deposit. University Police can be reached at 756-2281.

Depositing Checks - Checks Must:

- The payee name is a club and has not been altered
- The date is within six months of receipt
- Be legible and have a consistent amount, both numeric and written
- Have proper account holder signature (authorized signer)
- The name, address and check number are all printed (not handwritten)
- Any corrections are limited to two and are initialed by the signer

Availability of Funds

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

Processing Credit Card Transactions (Non-Donation Related)

The practice of writing down credit card numbers and providing them to ASI Club Services for processing is not permitted. Clubs interested in accepting credit card payments, will be required to utilize the PayPal system. To receive a PayPal button on your club webpage, please complete the PayPal Button Request Form available at asi.calpoly.edu. All requests must be submitted 14 days in advance for processing.

Returned (“bounced”) Checks

If a deposited check is returned from the bank due to insufficient funds, stop payment, stale check, or any other reason, the ASI Business Office staff sends a collection letter to the individual who wrote the returned check. The letter states that the amount of the check plus a collection fee of \$5 plus current bank fees for returned items, must be paid in the form of cash, money order or cashier’s check.

If the check writer approaches an officer to make payment, the individual should be directed by the officer to the ASI Business Office to make the payment. ASI Club Services will not be able to track payments or record the transaction accurately if done otherwise.

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

Withdrawing Funds from a Club Account

Clubs may use funds to pay invoices and reimburse club members by filling out a Payment Request Form (PRF). This form requires both an advisor and officer signature (verified from the current Charter). **The officer signature must be different than the payee.** If the PRF is submitted with all required information, signatures and supporting documentation, payment will be available within five to seven business days.

Payment Request Forms (PRF)

A PRF is a form to request that funds be paid to a person, business or other club (in the form of a check or transfer) or reserved in the club's account (through a purchase order) to ensure payment to a vendor or service provider at a later date.



CLUB PAYMENT REQUEST FORM

Please reference Club PRF Checklist

Date Generated: 8/25/2011

Select appropriate box.

Issue CHECK Issue PURCHASE ORDER Transfer (Between clubs only)

Select what to do with the check or P.O. once it is ready.

CHOOSE ONE:
 MAIL With Attached FAX Purchase Order to Number _____
 CAMPUS MAIL With Attached
 HOLD WITH CLUB SERVICES Attn: _____
*To be picked up by: _____

The Payee's address is always required even if the check is being held.

Payee Name: John Doe Amount \$: **\$159.03**
For services or scholarships, attach W-9 & copy of contract for new vendor: IRS Form W-9 Attached Copy of Contract Att
Payee Street Address: **411 Information Drive** Invoice #: _____
City: **San Luis Obispo** State: **CA** Zip Code: **93401** Phone: **555-555-5555**

You must select these boxes in order to utilize ASI Club Funding or if any Cal Poly name, logos marks, and/or symbols were used on the items being purchased reimbursed.

CLUB NAME: Let's Have Fun Club ACCOUNT NUMBER: 12345
 YES NO **My club has received Club Sponsorship for the 2011-2012 fiscal year.**
 YES NO **Use Club Sponsorship to pay for the following expenses. See Club Sponsorship Procedures for qualifying expenses.**
 YES NO **The Cal Poly name, logos, marks, and/or symbols were used on the items listed below.**

QTY	DESCRIPTION	UNIT PRICE	ITEM TOTAL	ACCOUNTING USE
1	Vons	\$ 43.25	\$ 43.25	
1	Costco	\$ 88.93	\$ 88.93	
1	Ralphs	\$ 26.85	\$ 26.85	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	

Multiple receipts for the same payee can be submitted on one PRF (as long as the receipts do not exceed the number of line items available) Enter the entire reimbursement amount per receipt (do not break out sales tax and shipping)

Signatures: All Payment Request Forms must be signed by a Club Officer and a Club Advisor. The signatories must be listed on the current Club Charter on file with Club Services. Any form without proper signatures will be returned to the club.

Backup Documentation: Original, itemized receipts are required for all reimbursements; copies will not be accepted. If you are paying a vendor, you must indicate if the product/service has been received. Explanation of all short pays and non-reimbursed items must be included. Submitting incomplete paperwork will delay payment.

Services: Payments to service providers must be accompanied by a completed W-9 tax form

Sales and Use Tax: All tax requirements will be applied as appropriate.

ubtotal	\$159.03
shipping	
sales Tax	
TOTAL	\$159.03

All signatures must be original

Signature: Sandra Jones Print Name: Sandra Jones Phone: 555-555-1234 Date: 8/25/2011
"I verify that club funds will not be used to purchase alcohol or to reimburse for alcohol expenses"
Signature: Timothy Smith Print Name: Timothy Smith Phone: 555-555-6789 Date: 8/25/2011

FOR OFFICE USE ONLY:
Club Balance: _____ CF: Yes No CF Balance: _____ CF#: _____
OSA Signature: _____ Date: _____ SL&L Director: _____ Date: _____

Please note: at no time can Payment Request forms be used to request petty cash. Petty cash is not available to clubs.

PRF Backup Documentation

New for 2011-2012

Effective October 22, any receipts submitted without proof of payment or any lost receipts regardless of payment method will not be reimbursed.

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

Providing the necessary supporting documentation for a PRF can get confusing. Below is a guide to help you make sure that your club's PRF's have sufficient documentation. When reimbursing a club member for a receipt/invoice the following documentation needs to be attached to a PRF:

- Proof of Purchase and Payment: (at least one of the following must be provided)
 - Original itemized receipt/invoice listing the item(s) purchased; receipt/invoice must show that payment was made in cash, check, or credit card.
 - Original handwritten receipt/invoice must have company name and contact information printed on the receipt.
 - Online orders- print copy of **acknowledgement of order** (should be the final receipt) with the payee name and listing item(s) and cost; documentation must state that payment was made in cash, check, or credit card.

Please note: lost receipts for cash purchases will not be reimbursed. In addition, Do not highlight receipts as this makes the ink on the receipts disappear!

PRF's for Invoices

When paying a company directly the following documentation needs to be attached to a PRF:

- Original invoice from company detailing:
 - Company name and contact information
 - Invoice date
 - Items being purchased
 - Amount owed
- IRS form W-9 for the vendor must be on file or attached to the PRF in order to process the request (contact a Club Services representative to see if W-9 is needed from your vendor.)

Please note: supporting documentation must state that it is an invoice (cannot state that it is an estimate, quote, statement, etc.) If the documentation states that it is an estimate or quote, ASI can only issue a Purchase Order.

PRF's for Contracts

When paying a company utilizing a contract as supporting documentation, the following needs to be verified and attached to a PRF:

- Contract is signed by appropriate campus entity
- Payment terms are specified in the contract
- Amount due is specified in the contract
- IRS form W-9 for the vendor must be on file or attached to the PRF in order to process the request (contact a Club Services representative to see if W-9 is needed from your vendor)
-

- **PRF's for Scholarships/Awards**

When paying someone who has received a scholarship/award, the following directions must be followed when filling out the PRF:

- Make the PRF payable to "CPSU Financial Aid" and include the students Employee ID# on the PRF Form
- Address: University Cashier
- Attn: Yvonne Ramos
- Administration Bldg 131 E
- Back-Up Documentation:
 - Must indicate the recipient's name
 - Employee ID
 - The scholarship amount
 - Club name that is providing the scholarship
 - Memo from the Advisor and back-up documentation stating the reason for the scholarship and how the recipient was selected

Please note: whatever is stated on the advisor memo, must also have appropriate back-up documentation to support the memo (i.e. if the scholarship is for an essay contest, the club must provide a copy of the essay rules, and a copy of the essay).



CLUB PAYMENT REQUEST FORM

Please reference Club PRF Checklist

Date Generated: 8/25/2011

<input checked="" type="checkbox"/> Issue CHECK	<input type="checkbox"/> Issue PURCHASE ORDER	<input type="checkbox"/> Transfer (Between clubs only)
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CHOOSE ONE:

<input type="checkbox"/> MAIL <input checked="" type="checkbox"/> With Attached	<input type="checkbox"/> FAX Purchase Order to Number _____
<input checked="" type="checkbox"/> CAMPUS MAIL	<input type="checkbox"/> With Attached
<input type="checkbox"/> HOLD WITH CLUB SERVICES	Attn: Yvonne Ramos
*To be picked up by: _____	

Payee Name: CPSU - Financial Aid Amount \$: **\$1,000.00**

For services or scholarships, attach W-9 & copy of contract for new vendor: IRS Form W-9 Attached Copy of Contract Att

Payee Street Address: **Administration Bldg. 131 E.** Invoice #: 9876CL

City: **San Luis Obispo** State: **CA** Zip Code: **93410** Phone: **805-756-7243**

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

YES NO **My club has received Club Sponsorship for the 2011-2012 fiscal year.**

YES NO **Use Club Sponsorship to pay for the following expenses. See Club Sponsorship Procedures for qualifying expenses.**

YES NO **The Cal Poly name, logos, marks, and/or symbols were used on the items listed below.**

QTY	DESCRIPTION	UNIT PRICE	ITEM TOTAL	ACCOUNTING USE
1	Scholarship to Cindy Loo	\$ 1,000.00	\$ 1,000.00	

- Submit the completed Payment Request Form to ASI Club Services
 - ASI Club Services will check the PRF for completeness and for correct signatures
 - PRF will be processed and a check sent to Cal Poly's Financial Aid Office
- The funds will either be directly deposited into the recipients account, or a check will be mailed to the current mailing address on the recipients Cal Poly Portal.
- It will take approximately 2 to 4 weeks for the scholarship to be distributed

If your club will be distributing money as an award, the subsequent procedures must be followed:

- Complete the PRF
 - Make the PRF payable to the student receiving the award
 - Back-up documentation must include a completed W-9 tax information form
 - An Advisor memo must be submitted explaining the award

- Attach any supporting documents to the memo (anything listed in the memo must have supporting documentation).

Please note: if an individual is awarded over \$600.00 in a fiscal year it is considered taxable income and must be reported to the IRS.

Invoices from Campus Vendors and Service Providers

Once ASI Club Services receives an invoice from the campus vendor/service provider, we will email the club a form letter informing them the amount of the charge. If the club does not contact ASI Club Services to dispute the amount within 5 business days, the amount will be charged to their club account.

Invoices from Off-Campus Vendors and Service Providers

If ASI Club Services receives a club invoice in the mail, and the club does not have a Purchase Order on file, the invoice will be placed in the club's mailbox. The club must then create a PRF and provide appropriate supporting documentation to pay the service provider/vendor (see PRFs for Invoices above).

Purchase Orders (P.O)

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

To request a P.O. check the "Issue Purchase Order" box at the top of the PRF. Fill out the name, address, phone and fax number of the vendor along with the appropriate club information.



CLUB PAYMENT REQUEST FORM

Please reference Club PRF Checklist

Date Generated: 8/25/2011

<input type="checkbox"/> Issue CHECK	<input checked="" type="checkbox"/> Issue PURCHASE ORDER	<input type="checkbox"/> Transfer (Between clubs only)
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CHOOSE ONE:

<input type="checkbox"/> MAIL <input checked="" type="checkbox"/> With Attached	<input checked="" type="checkbox"/> FAX Purchase Order to Number <u>805-534-1293</u>
<input type="checkbox"/> CAMPUS MAIL	<input type="checkbox"/> With Attached
<input type="checkbox"/> HOLD WITH CLUB SERVICES	Attn: _____
*To be picked up by: _____	

Payee Name <u>Left Coast T-Shirt Company</u>	Amount \$: \$200.00
For services or scholarships, attach W-9 & copy of contract for new vendor <input checked="" type="checkbox"/> IRS Form W-9 Attached <input type="checkbox"/> Copy of Contract Att	
Payee Street Address: <u>755 Fiero Lane</u>	Invoice #: <u>9876CL</u>
City: <u>San Luis Obispo</u> State: <u>CA</u> Zip Code: <u>93401</u>	Phone: <u>805-547-1622</u>

CLUB NAME: <u>Let's Have Fun Club</u>	ACCOUNT NUMBER: <u>12345</u>
---------------------------------------	------------------------------

<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	My club has received Club Sponsorship for the 2011-2012 fiscal year.
<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	Use Club Sponsorship to pay for the following expenses. See Club Sponsorship Procedures for qualifying expenses.
<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	The Cal Poly name, logos, marks, and/or symbols were used on the items listed below.

QTY	DESCRIPTION	UNIT PRICE	ITEM TOTAL	ACCOUNTING USE
20	Club Shirts	\$ 10.00	\$ 200.00	

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

When issuing a P.O. the following documentation needs to be attached to the PRF:

- IRS form W-9 for the vendor must be on file or attached in order to process the request (contact ASI Club Services if you are not sure). If not on file, it is the club's responsibility to obtain one from the company.
- An estimate or quote detailing what is going to be purchased, and the amount of the purchase with the expected shipping charges.

Upon receiving the final invoice we will contact the club to ensure that the items or services were received and that the amount (if over the original P.O. amount) is ok to pay. If the club receives an invoice, it will need to be delivered to ASI Club Services in order for the company to receive payment.

Transfers

Funds can be transferred from one Cal Poly clubs account to another by completing a PRF. Under "Name," put the club's name and account number to which funds are being transferred. It is not necessary to fill out the "Address" in this situation. Insert the clubs account number and name from where the funds are being transferred. Under "Description," write "transfer" and an explanation of why the transfer is necessary.



CLUB PAYMENT REQUEST FORM

Please reference Club PRF Checklist

Date Generated: 8/25/2011

Issue CHECK
 Issue PURCHASE ORDER
 Transfer (Between clubs only)

CHOOSE ONE:

MAIL With Attached

CAMPUS MAIL

HOLD WITH CLUB SERVICES

*To be picked up by: _____

FAX Purchase Order to Number 805-594-1293

With Attached

Attn: _____

Payee Name Hackey Sack Club - 23456 Amount \$: **\$100.00**

For services or scholarships, attach W-9 & copy of contract for new vend: IRS Form W-9 Attache Copy of Contract Att

Payee Street Address: _____ Invoice #: 9876CL

City: _____ State: _____ Zip Code: _____ Phone: _____

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

YES NO **My club has received Club Sponsorship for the 2011-2012 fiscal year.**

YES NO **Use Club Sponsorship to pay for the following expenses. See Club Sponsorship Procedures for qualifying expenses.**

YES NO **The Cal Poly name, logos, marks, and/or symbols were used on the items listed below.**

QTY	DESCRIPTION	UNIT PRICE	ITEM TOTAL	ACCOUNTING USE
1	Per instructions: Transfer half of the banquet event costs	\$ 100.00	\$ 100.00	

When requesting a Transfer the following documentation needs to be attached to a PRF:

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

Please note: A transfer can only be done between clubs; whatever is stated in the advisor memo must be proved with additional supporting documentation.

Payment Request Form (PRF) Guidelines

- Individuals cannot be reimbursed for the purchase of pre-paid credit cards or gift cards for vendors who sell alcohol (Examples: cards for grocery stores, restaurants, restaurants with bar service, etc.) Since items bought with a pre-paid credit card or gift card cannot be tracked, there is no way to audit the expenditures to ensure alcohol wasn't purchased.
- Club members, even with financial authorization on the club Charter, cannot sign their own PRFs; another officer with financial authorization must sign the PRF for checks and balances purposes.
- Lost receipts for cash purchases will not be reimbursed, even with an Advisor memo. Without a receipt, there is no way to track the transaction or to prove that a transaction took place.
- Club Payment Request Forms are not permitted to have white-out on them since we cannot tell when the white-out was used (before or after signatures). PRFs that are submitted with white-out will be returned to the club and must be redone in order to process. If changes are necessary, the following protocol must be followed:
 - Draw a single line through the incorrect information and have the club officer initial next to it
 - Write the correct information on the form
 - The correct information must be initialed by the advisor prior to submitting to ASI Club Services
- The Club PRF includes additional questions pertaining to the use of ASI Club Sponsorship Funds and the use of Cal Poly's Marks.
 - On the PRF there are three check boxes right underneath your club name that state:

- “My club has received Club Sponsorship for the 2011-12 fiscal year”.
- “Use Club Sponsorship to pay for the following expenses (See Club Sponsorship procedures for qualifying expenses)”.
- “The Cal Poly name, logos, marks, and/or symbols were used on the items listed below”.



CLUB PAYMENT REQUEST FORM

Please reference Club PRF Checklist

Date Generated: 8/25/2011

<input type="checkbox"/> Issue CHECK	<input type="checkbox"/> Issue PURCHASE ORDER	<input type="checkbox"/> Transfer (Between clubs only)		
<i>CHOOSE ONE:</i>				
<input type="checkbox"/> MAIL <input checked="" type="checkbox"/> With Attached	<input type="checkbox"/> FAX Purchase Order to Number _____			
<input type="checkbox"/> CAMPUS MAIL	<input type="checkbox"/> With Attached	Attn: _____		
<input type="checkbox"/> HOLD WITH CLUB SERVICES				
*To be picked up by: _____				
Payee Name _____		Amount \$: \$0.00		
For services or scholarships, attach W-9 & copy of contract for new vendor: <input type="checkbox"/> IRS Form W-9 Attached <input type="checkbox"/> Copy of Contract Attached				
Payee Street Address: _____		Invoice #: _____		
City: _____	State: _____	Zip Code: _____		
City: _____		Phone: _____		
CLUB NAME: <u>Let's Have Fun Club</u>		ACCOUNT NUMBER: <u>12345</u>		
<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	My club has received Club Sponsorship for the 2011-2012 fiscal year.			
<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	Use Club Sponsorship to pay for the following expenses. See Club Sponsorship Procedures for qualifying expenses.			
<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	The Cal Poly name, logos, marks, and/or symbols were used on the items listed below.			
QTY	DESCRIPTION	UNIT PRICE	ITEM TOTAL	ACCOUNTING USE
		\$ -	\$ -	

- By checking “yes” or “no” next to these boxes will determine how ASI Club Services processes the PRF.
- For clubs that have received ASI Club Sponsorship (\$350), you would check “yes” next to the first statement. This check box is meant to help you think about whether or not the club has applied for and been allocated ASI Club Funding for the current fiscal year.
- The next check box is crucial in actually utilizing your ASI Club Sponsorship funds; by checking “yes” it means that the club wants the specific expenses associated with that particular PRF to be used towards the \$350 of ASI Club Funding. If the club checks “no” or leaves this check box blank, this means that even if the club has been granted ASI Club Funding, and has some or all of \$350 left to spend,

none of the qualifying expenses associated with that PRF are going to be paid for using ASI Club Funding. Please also keep in mind that once a PRF has been processed, unless it is an error on behalf of ASI Club Services, we will not be able to go back and apply ASI Club Sponsorship funds to those expenses.

- The third and final check box allows ASI Club Services to know whether or not any merchandise being reimbursed or paid for has use of the Cal Poly name, logos, marks, or symbols. If the box is checked “yes” the appropriately signed licensing forms must be attached to the PRF in order to be processed. If the box is checked “no,” we will take the club’s word that none of the above information has been used on the merchandise. If the box is left blank, and yet the back-up documentation shows that merchandise of one kind or another has been purchased, the PRF will not be able to be processed and will be returned to the club’s mailbox. Failure to use a properly licensed vendor, or failure to get approval when purchasing merchandise using the Cal Poly marks may lead to suspended club privileges, the vendor not being paid, or not receiving reimbursement.
- Please note: every year our PRF is updated and the most current form can be found at <http://www.asi.calpoly.edu/financials>. Failure to use the most recently updated form could result in your club’s PRF being returned.

Paying Sales Tax

Cal Poly clubs must abide by sales tax reporting laws. California has a “sales and use tax,” which means that for all purchases, except for services, sales tax must be paid. If the vendor does not collect California sales tax from the purchaser, such is the case when out-of-state orders are made, ASI must assess the club for the tax that should have been collected by the vendor and remit it to the State Board of Equalization directly.

Accounts Payable will determine if a sales tax reporting issue is present. This assessment may result in a different amount recorded for disbursements than originally requested.

The reimbursement to the individual will remain unchanged; however the club will be debited the reimbursement amount plus applicable taxes. Tax is treated as an adjustment and the officers/advisor(s) are not normally notified about the adjustment. Such adjustments are viewable on the Transaction Reports which are available at the request of the club through ASI Club Services.

Another sales tax issue occurs when an individual pays out-of-pocket for expenses in addition to personal items on the same receipt. Remember to add the appropriate sales tax to the reimbursement amount. Check the receipt for the appropriate sales tax rate since sales tax rates vary throughout California. ASI Club Services staff members will adjust the sales tax if necessary. To simplify the payment process, club members should be encouraged to keep personal purchases separate.

Item Tax Rate

- Items delivered to Cal Poly 7.25% (Cal Poly is not in the city limits of San Luis Obispo)
- Items picked up within the city of San Luis Obispo 7.75%
- Other city/county rates vary. Please check receipts for the appropriate reimbursable tax rate.

Processing Delay

There are situations when incomplete paperwork is submitted for processing. ASI Club Services staff attempts to minimize the submission of incomplete paperwork by reviewing documents when received, but if a delay is necessary the listed club officer and/or advisor will be contacted. Incomplete paperwork will be returned to the club

mailbox. Once the issues are resolved, the paperwork can be resubmitted for processing.

Delinquent Accounts

Clubs maintain accounts and privileges by having a positive account balance. ASI Club Services staff prepares and distributes a list of clubs with delinquent (negative) account balances monthly to all departments on campus where clubs are permitted to charge for products or services (i.e. audio-visual, vehicle rentals, catering orders, etc.). These departments and vendors are likely to not permit clubs to charge to their accounts if they are on the delinquent list. A delinquent account may also result in judicial proceedings against the club. Other paperwork, such as PRFs and E-Plans may not be processed until the club account is brought current.

Charging Privileges

Clubs can charge for services and products with various entities on campus; each area has its own policy for allowing clubs to charge. Normally the service or product provider does not verify that the club has enough funds to cover the charges. Therefore, it is important for the club to verify fund availability before charging for a product or service from a campus provider. For campus providers, the club should give enough time to request a P.O. instead of risking complications later.

By having a P.O. on file it will ensure the club has sufficient funds in their account to cover the expenses being requested. Certain campus entities will only accept a P.O. from a club prior to providing any goods or services. Campus providers have different deadlines and may only accept cash payment to guarantee payment if a P.O. is not on hand prior to the requested service or delivery date.

The following will be automatically charged to club account (Clubs will receive a notification email to approve or deny these charges, but if no response is received

the bill will automatically be paid after five business days of notification); please note- a Purchase Order is always recommended to assure that funds are held for these expenses:

- ASI Audio Visual
- ASI Craft Center
- ASI Rec Sports/Sports Complex
- CPSU Facility Services (If department is having trouble finding your account please contact ASI Club Services for assistance)
- All State Accounts (i.e. Department accounts, facility services, parking, etc.)

The following vendors require a Purchase Order prior to releasing the product or service:

- Campus Catering and Ciao Pizza
- Performing Arts Center (PAC)
- C.P. Meat Lab, Poly Plant Shop, C.P. Chocolates, Campus Market
- University Graphics Systems (UGS)

Gift and Donation Processing

Credit Card Donations:

All donations being made via credit card must be processed through the Cal Poly “Give a Gift” website. Below are step by step instructions on how to use the website:

- Go to www.calpoly.edu

- Click the “Make a Gift” tab at the top



- Select the “Give Online” button on the right side of the page



- Step 1: Scroll down and select “Student Affairs and Clubs”, then find the club you wish to make a donation to and select. If the club is not listed, select “Other” and write fund name in step two. Enter the donation amount.
- Step 2: Select the relationship to the University and add in any special requests for the donation (This is where the club name will be filled in if it is not listed on the drop-down list).

Step 2: Information About You and Your Donation

Your relationship to the University

→ Please Select One ▾

Please tell us if you have any special requests for your donation

- Step 3: Enter credit card information by selecting payment method, entering in the credit card number and expiration date.

Step 3: Select Credit Card

Payment Method Please Select Type ▾

Card Number

Expiration Date JAN ▾ 2011 ▾

- Step 4: Enter billing address by giving the required personal information needed to process the donation including the donor's full name, complete home address, and email address.

Step 4: Enter Your Billing Address

(Please provide information exactly as it appears on your Credit Card)

* First Name:

Middle Initial:

* Last Name:

* Phone:

* Address 1:

Address 2:

* City:

* State:

* Zip:

* Email:

- Select Continue at the bottom.

The donation will now be processed and deposited into the club's account. All donations made via the Cal Poly "Give a Gift" site will incur a 15% processing fee from University Advancement.

For all questions regarding the Give a Gift site, please contact Craig Nelson, Director of Cal Poly Fund and Advancement Services at (805)756-1558

Cash or Check Donations:

For donations of money (cash or check only) complete a Cash/Securities Gift Information Form. A separate form must be completed for **each** donation. Attach the check or cash to the form. Be sure to complete all required fields, and have an officer of

the club sign the “Gift Received By” and the club advisor sign the “Approved By” section. Turn in all completed forms to ASI Club Services during operating hours. For safety reasons, Cash Securities forms cannot be placed in the ASI Club Services drop box, they must be handed directly to an ASI Club Services frontline student at least 30 minutes prior to the close of business.

The donation will be processed and a deposit will be made to the club account. Please note that ASI Club Services does not charge a processing fee for donations made via check or cash.

Donations of Supplies or Other Goods (Gift in Kind Forms):

For donations of supplies or other goods complete a Gift In-Kind Form. Attach all documentation supporting the acceptance of the gift, and documentation of the value of the donation (provided by the donor). Be sure to complete all required fields, and have an officer of the club sign the “Gift Received By” section and the club advisor sign the “Approved By” section. Turn in all completed forms to ASI Club Services at least 30 minutes prior to the close of business.

Gifts-in-Kind With a Value More Than \$5,000

All gifts-in-kind with a value more than \$5,000 are to be reported immediately upon receipt on the Gift-in-Kind Acceptance Form. This form is available on the Web at: <http://advancement.calpoly.edu/forms>. All gifts-in-kind from individuals and all gifts that require special expertise to establish the value, e.g. works of art, horses, etc., with a value more than \$5,000 must include an appraisal executed by a qualified independent appraiser. The appraisal cannot be made earlier than 60 days prior to the date of the gift. If the value of the gift in the appraisal is listed as a range of values, the gift will be booked at the midpoint of the range of values.

In most cases, gifts-in-kind that are produced or manufactured by the corporation or other business making the contribution and that have a value more than \$5,000 must include an itemized inventory list, an invoice or letter from the vendor/donor, or published information on the value of the items. Gifts of equipment and software should be booked at the educational discount value – the value the University would have paid had the equipment or software been purchased from the vendor.

Gifts-in-Kind With a Value Between \$100 and \$5,000

All gifts-in-kind with a value between \$100 and \$5,000 are to be reported immediately upon receipt on the Gift-in-Kind Acceptance Form. This form is available on the Web at: <http://advancement.calpoly.edu/forms>. Written documentation provided by the donor is required to establish the value of the gift for all gifts-in-kind. Any gift-in-kind with a value in the range of \$100 to \$5,000 that is not accompanied by the required documentation from the donor will be recorded on the University's gift record system at a nominal value (\$1). The Campus Expert Form can still be used to establish an internal value for gifts-in-kind valued at \$5,000 or less, but the internal value will be used for recognition credit only.

Gifts-in-Kind With a Value Under \$100

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

Items Not Considered Charitable Contributions

Based on CASE and FASB guidelines and IRS regulations, the following types of in-kind contributions are not considered charitable contributions and will not be included in the University's annual fund-raising totals:

- Use of real property

- Discounts on purchases
- Costs of appraisal
- Shipping costs
- Sales tax
- Permanent Loan: Property given to Cal Poly as a permanent loan will not be booked as a gift.

Additional Information for Gift In Kinds

Gift Recipient

- A faculty or staff member at Cal Poly should be listed as the recipient of the gift in-kind on the Gift-in-Kind Acceptance Form. If students are involved in receiving the gift, the faculty or staff member who is both overseeing the work of the students and taking responsibility for the gifts that are received will be the appropriate person to list on the Acceptance Form.

Donee of Gift

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

Qualified Appraisal

A qualified appraisal must include the following information:

- A description of the property in sufficient detail for a person who is not generally familiar with the type of property to determine that the property appraised is the property that was contributed.

- The physical condition of any tangible property.
- The date (or expected date) of the contribution.
- The terms of any agreement or understanding entered into (or expected to be entered into) by or on behalf of the donor that relates to the use, sale, or other disposition of the donated property.
- The name and address of the qualified appraiser. Must include a disclaimer statement regarding any affiliation with the donor or the contributed property.
- The qualifications of the qualified appraiser who signs the appraisal, including the appraiser's background, experience, education, and membership in professional appraisal associations.
- The date (or dates) on which the property was valued.
- The appraised fair market value on the date (or expected date) of contribution.
- The method of valuation used to determine the fair market valuation.
- The specific basis for the valuation, such as any specific comparable sales transactions.

Gift in Kind Acknowledgements

Gift acknowledgement letters and tax receipts for gifts-in-kind will only describe what was given and never include the estimated cash value or the appraised value of the gift. All donors making in-kind contributions \$250 and above will receive an official tax receipt from University Advancement that includes the description of the gift and the gift designation.

Acknowledgement:

When your club receives a donation, and the proper process has been followed (online via the Give a Gift site, Cash Securities Form, Gift in Kind Form) the University will mail the donor an official tax receipt letter for their records.

In addition to University Advancement and University Presidential acknowledgements, all club leaders are strongly encouraged to write acknowledgement letters to thank donors.

Financial Statements

Transaction reports are available upon request in ASI Club Services. An example of a club Transaction Report can be seen below.

Please note: negative amounts [in (xx.xx)] are cash in bank or deposits. Positive amounts are withdrawals

		Key	Object	Post Date	Reference	Description	Transaction SS	Amount	Ann Budget	Pct	Variance	Update			
								Beginning Balance							
Club Funding Allocation						* Object Code: 690000		Beginning Balance:			(416.40)	0.00	0.00	0.00%	416.40
								Ending Balance:			(416.40)				
		76370	690099	11/4/10	JA020865	82 Club Sponsorship	JE	(350.00)							11/12/10
Deposits						* Object Code: 690099		Beginning Balance:			0.00	(350.00)	0.00	0.00%	350.00
								Ending Balance:			(350.00)				
		76370	690100	11/23/10	JA021031	#118510: From Louisiana Tech U	JE	(48.27)							12/1/10
		76370	690100	2/2/11	JA021562	#117851 2011 Membership Dues	JE	(425.00)							2/8/11
		76370	690100	2/23/11	JA021736	#117964 Membership Dues	JE	(75.00)							3/1/11
Club Funding Withdrawals						* Object Code: 690100		Beginning Balance:			0.00	(548.27)	0.00	0.00%	548.27
								Ending Balance:			(548.27)				
		76370	890099	2/4/11	RB013111	HUGHES, ERIC Club Funding Expe	OH	39.13							2/4/11
		76370	890099	4/22/11	RB041111	HUGHES, ERIC Club Funding Expe	OH	310.87							4/22/11
Withdrawals						* Object Code: 890099		Beginning Balance:			0.00	350.00	0.00	0.00%	(350.00)
								Ending Balance:			350.00				
		76370	890100	4/22/11	RB041111	HUGHES, ERIC Club Withdrawals	OH	369.51							4/22/11
		76370	890100	5/6/11	INV050311	CPSU MD116 5800 Forestry Honor	OH	15.00							5/6/11
		76370	890100	6/13/11	2696	XI SIGMA PI Club Withdrawals	OH	422.18							6/13/11
						* Object Code: 890100		Beginning Balance:			0.00	806.69	0.00	0.00%	(806.69)
								Ending Balance:			806.69				
		** Org key: 76370				Beginning Balance:		(416.40)			258.42	0.00	0.00%	157.98	
						Ending Balance:		(157.98)							
		*** Report Total:				Beginning Balance:		(416.40)			258.42	0.00	0.00%	157.98	
						Ending Balance:		(157.98)							

Ending Balance (red is positive)

ASI Club Funding

In support of the “Ultimate College Experience,” ASI Club Funding is available to currently chartered clubs operating under contract with the University. Funding is available to enhance the cultural, educational, social, and recreational opportunities for all Cal Poly students.

Eligibility

Chartered Cal Poly clubs are eligible to receive ASI Club Funding.

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

Terms of Funding

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

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

Club Sponsorship (\$350)

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

Event Co-Sponsorship (up to \$1,500)

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

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

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

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

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

College Council Funding (\$424.00 + \$0.16 per student per College)

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

per College Council per fiscal year. For additional information regarding obtaining ASI College Council Funding and spending guidelines, please contact the ASI Business Office.

To view the complete procedures for ASI Club Funding, or to complete an application for funds, visit asi.calpoly.edu.

Activity Planning and the E-Plan Process

For every club event, on or off campus, an E-Plan is required. An E-Plan (Event Plan) is a process that assists in event planning. It serves as a tool for campus entities to coordinate and accommodate multiple campus events and assess each event for risk. E-Plans must be completed, approved, and submitted online.

New for 2011-12

All club events and meeting requests will be submitted online via an E-Plan. The E-Plan has been restructured to contain multiple deadlines, determined by the event's requirements and location. There are now three types of E-Plans: E-Plan Fast Pass, E-Plan Short Form, and E-Plan Long Form which are outlined below in further detail. In addition, this year any club event member is now able to initiate and create an E-Plan. The club president and advisor will then be notified of the request and will be required to approve the request before it can be processed.

Types of E-Plans

E-Plan Fast Past:

The E-Plan Fast Past is designed to accommodate scheduling general club meetings in a three day deadline. If the club meeting does not require other on campus entity approvals, and is located in an assignable classroom space, the club can use the E-Plan Fast Pass. The E-Plan Fast Pass must be submitted online at least three business days prior to the date requested.

E-Plan Short Form:

The E-Plan Short Form is designed to accommodate scheduling on-campus club events in a seven day deadline. If a club event is on-campus, and does not require any staffing support, the club can use the E-Plan Short Form to schedule their event. The E-Plan

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

E-Plan Long Form:

The E-Plan Long Form is utilized to schedule club events that have multiple campus entity approvals. If a club event is taking place off-campus or requires staffing, traveling, alcohol, or the club will be entering into a contract, an E-Plan Long Form must be utilized to schedule the event. The E-Plan Long Form must be submitted a minimum of fourteen calendar days prior to the date requested.

Outlined below is a quick guide for determining what type of E-Plan to use in planning an event.

Types of E-Plans	E-Plan Fast Pass	E-Plan Short Form	E-Plan Long Form
Timelines	3 business days	7 days	14 days
Event Locations	<ul style="list-style-type: none"> • Applicable classrooms for 2 hours or less • UU Conference Rooms (except UU 220) • Sandwich Boards • UU Plaza, Dexter Lawn, Mott Lawn (information tables, and booths only) 	<ul style="list-style-type: none"> • Applicable classrooms for any length of time • UU Plaza, Dexter Lawn, Mott Lawn, O’Neill Green (events, information tables, or booths) • UU Lounges (San Luis or Bishops) • UU Plaza Stage • UU Plaza Marketplace • Cal Poly P 	<ul style="list-style-type: none"> • Off-campus events • Chumash Auditorium • UU 220 • Performing Arts Center • Cal Poly Theater • Mott Complex • Sports Complex
Events Involving	<ul style="list-style-type: none"> • Chalking • Amplified sound/music • Parking permits • Renting sporting equipment 	<ul style="list-style-type: none"> • Food or drink • Sale of merchandise • Use of Cal Poly names, symbols or marks • Showing a film or video 	<ul style="list-style-type: none"> • Contracts • Paid service providers • Travel • Alcohol • ASI Staffing

Steps for Completing an Online E-Plan

Check Space Availability

To find what spaces are available for clubs to reserve, use the website events.calpoly.edu to access the Cal Poly Master Calendar. The Campus Master Calendar has three general methods of navigation, which can be selected from the banner at the top of the page: “View Event Category,” “View Events by Venue” and “View Events by Building”.

Search by “View Event by Category”

Will automatically default to “View Events by Category”. Events will only show up if the club has requested that it be visible on the web.

Skip to Content

CAL POLY Events Campus Master Calendar Quick Search Campus Map Calendar Tutorial

View Events by Category View Events by Venue View Events by Building

Event Quick Search

Name

Contains

Go

Day Week Month

August 2011

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Go to Today

Select a Category

- All Events
- Athletic Events
- Club Events
- Club Sports
- Continuing Education
- Cultural Events
- General Events
- Osher Lifelong Learning Institute
- Performing Arts
- Recreational Sports
- Student Events - ASI
- Student Events - Greeks
- Student Government

Events for Tuesday Aug 02 2011

(Click the Event Title for additional information)

Start	End	Event	Location
10:00 AM	01:00 PM	SOAR 2011: CAFES (College Connection Overview - Chumash)	065 -0 Chumash Auditorium
10:00 AM	11:30 AM	SOAR 2011: OCOB (College Connection Overview - Bldg 3-213)	003 -0213
10:00 AM	01:00 PM	SOAR 2011: OCOB (Advising Breakout Sessions - Bldg 3)	003 -0114, 003 -0201, 003 -0205, 003 -0209
01:00 PM	05:00 PM	SOAR 2011: CAFES (Advising Session Labs - Bldg 10 & 38)	010 -0204, 010 -0215, 038 -0123, 038 -0135, 038 -0204
01:00 PM	05:00 PM	SOAR 2011: OCOB (Advising Session Labs - Bldg 3)	003 -0300, 003 -0302, 003 -0303, 003 -0305
06:00 PM	08:00 PM	Rugby practice (Field 5 (160-163B))	160 -0163B
08:00 PM	10:00 PM	Campus Crusade: Summer Crusade (Bldg 33 Rm 286)	033 -0286

To make a reservation, please review [Who to Contact to Schedule an Event](#)

[Quick Search](#) | [Campus Map](#) | [Calendar Tutorial](#) | [Back to Top](#)
[Cal Poly Home](#) | [Cal Poly Find It](#) | [Academic Calendar](#) | [Course Catalog](#) | [Events and Entertainment](#)

University Scheduling Office
 California Polytechnic State University
 San Luis Obispo, CA 93407
 (805) 756-5550
events@calpoly.edu

Event pages are best viewed with Internet Explorer 7.0+ and Mozilla Firefox 3.0+.
 Use of older browsers might cause a distortion in the page layout.
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The events for the date chosen will pop up in the middle of the screen. Click on the specific event you are looking to gather more information about.

Events for Tuesday Aug 02 2011

(Click the Event Title for additional information)

Start	End	Event	Location
10:00 AM	11:30 AM	SOAR 2011: CAFES (College Connection Overview - Chumash)	065 -0 Chumash Auditorium
10:00 AM	11:30 AM	SOAR 2011: OCOB (College Connection Overview - Bldg 3-213)	003 -0213
10:00 AM	01:00 PM	SOAR 2011: OCOB (Advising Breakout Sessions - Bldg 3)	003 -0114, 003 -0201, 003 -0205, 003 -0209
01:00 PM	05:00 PM	SOAR 2011: OCOB (Advising Session Labs - Bldg 3)	003 -0300, 003 -0302, 003 -0303, 003 -0305
01:00 PM	05:00 PM	SOAR 2011: CAFES (Advising Session Labs - Bldg 10 & 38)	010 -0204, 010 -0215, 038 -0123, 038 -0135, 038 -0204

To make a reservation, please review [Who to Contact to Schedule an Event](#)

[Quick Search](#) | [Campus Map](#) | [Calendar Tutorial](#) | [Back to Top](#)
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After selecting the event, a larger screen will appear that will provide additional event details.

SOAR 2011: CAFES (1/3)

SOAR 2011: College of Agriculture, Food and Environmental Sciences - Freshmen Program

Time: Tue Aug 02 2011 10:00 AM to 11:30 AM


Location: **065 -0 Chumash Auditorium** University Union - Chumash Auditorium
(600 expected)

Web Site: <http://www.studentlife.calpoly.edu/orientation/soar>

Organization: SOAR

Requestor: SOAR ☎ 805.756-2233



Description: 

Search by “View Events by Venue”

To check space availability, on the home page, search “View Events by Venue”.

Searching for events by venue will allow you to see the availability of rooms that are similarly grouped and located. Events will only show up if the club has requested that it be visible on the web.

The screenshot shows the Cal Poly Events Campus Master Calendar interface. At the top, there are navigation links for "Quick Search", "Campus Map", and "Calendar Tutorial". Below this, there are three tabs: "View Events by Category", "View Events by Venue" (which is selected), and "View Events by Building".

The main content area is titled "Events for Tuesday Jul 19 2011" and includes a "View as a list" link. Below the title is a grid showing event blocks for various rooms. The rooms listed on the left are: 065 -0 Chumash, 065 -0204, 065 -0205, 065 -0207, 065 -0208, 065 -0216, 065 -0218, 065 -0219, 065 -0220, and 065 -0221. The time slots on the top are: 7:00, 8:00, 9:00, 10:00, 11:00, 12:00, 1:00, 2:00, 3:00, 4:00, 5:00, 6:00, 7:00, 8:00, and 9:00.

Event blocks are color-coded: blue for "Multiple Events" and yellow for "Event". For example, room 065 -0208 has a yellow block from 7:00 to 9:00. Room 065 -0219 has a yellow block from 9:00 to 11:00. Room 065 -0220 has a yellow block from 11:00 to 1:00. Room 065 -0216 has yellow blocks from 11:00 to 12:00 and 1:00 to 2:00. Room 065 -0218 has a yellow block from 2:00 to 4:00. Room 065 -0219 has a yellow block from 9:00 to 11:00. Room 065 -0220 has a yellow block from 11:00 to 1:00. Room 065 -0221 has a yellow block from 11:00 to 1:00.

At the bottom, there is a legend: ■ Academic Course or Exam | ■ Event | ■ Multiple Events | ■ Related Space Event | ■ Blackout

Athletic Venues
 Christopher Cohan Center
 Kennedy Library Learning Commons
 Lawns and Plazas
 Lecture Rooms
 Rec Center Venues
 Spanos Theatre
 Sports Fields
 U.U. Rooms

Search by Venue

	7:00	8:00	9:00	10:00
065 - 0 Chumash	[Multiple Events]			
065 - 0204	[Multiple Events]			
065 - 0205	[Multiple Events]			
065 - 0207	[Multiple Events]			
065 - 0208	[Event]			
065 - 0216				
065 - 0218				
065 - 0219			[Event]	
065 - 0220				
065 - 0221				

Legend: Academic Course or Exam | Event | Multiple Events | Related Space Event | Blockout

This shows you the rooms within the venue and also shows the room's availability. See the key for the type of activity taking place.

To get more information about the space, or to see a picture of the classroom, click on the building and room number.

065 - 0 Chumash
065 - 0204
065 - 0205
065 - 0207
065 - 0208
065 - 0216
065 - 0218
065 - 0219
065 - 0220
065 - 0221


065 - 0216

Julian A. McPhee University Union Conference Room

Features
 ASI Supported Smart Room Technology
 Glass board w/dry erase markers
 Projector - Data w/VGA cable
 Screen
 Sound available if needed

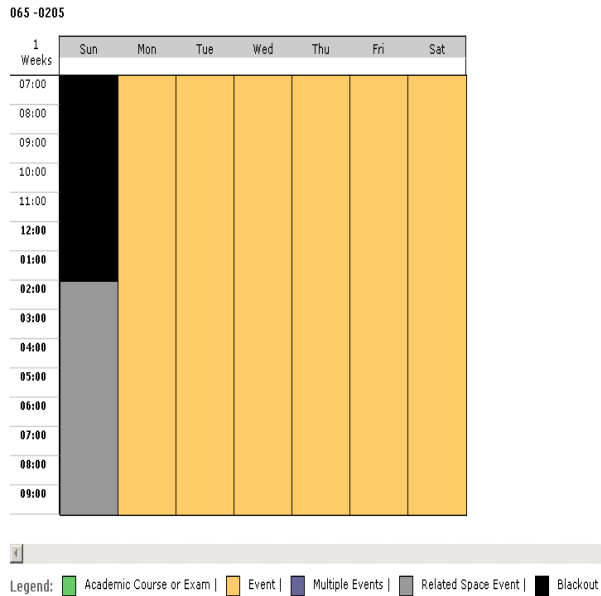
Custom Attributes

Layouts
 Executive - Closed (21 seats)



To view the availability for the week, click the **calendar icon** in the upper right corner of the room you are interested in.

065 -0	
Chumash	
065 -0204	
065 -0205	
065 -0207	
065 -0208	
065 -0216	
065 -0218	
065 -0219	
065 -0220	
065 -0221	



Search by “View Events by Building”

To search the availability of a specific building and room, use the tab “View Events by Building”. Searching events by building, will allow you to see what rooms are available for the specific building you are looking at. Events will only show up if the club has requested that it be visible on the web.

Space Quick Search

Space Name

Starts With

Number of weeks:

◀ August 2011 ▶

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Select a Location

- 002
- 003
- 004

002
002 -0013
002 -0021
002 -0024
002 -0025B
002 -0101
002 -0113
002 -0114
002 -0125
002 -0126
002 -0127
002 -0203
002 -0204
002 -0205
002 -0206
002 -0207
002 -0210
002 -0212
002 -0213
002 -0214



To view a picture of the classroom, or to get more information about the features of the classroom, click on the **building/room number** in the upper left corner of the screen.

002 -0101

1 Weeks	Sun	Mon	Tue	Wed	Thu	Fri	Sat
07:00							
08:00							
09:00							
10:00							
11:00							
12:00							
01:00							
02:00							
03:00							
04:00			█		█		
05:00			█		█		
06:00			█		█		
07:00							
08:00							
09:00							

010 -0220

Alan A. Erhart Agriculture

Features

- Blackboard - Large
- Blackboard - Medium
- Chairs - Small Tablet
- Connections - Ethernet Port
- MDS Supported Multimedia and Smart Room
- Projector - Data/Video
- Projector - Overhead
- Screens - Double Fixed
- Smart Room Technology - General Purpose Classrooms
- VCR/DVD/CD Combo

Custom Attributes

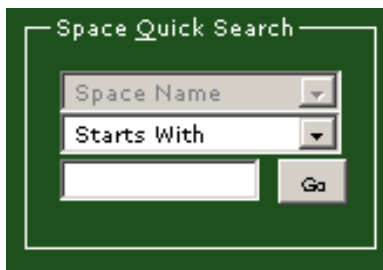
Layouts

- Lecture (62 seats)

To search for a specific event:

Use the Quick Search in the left margin. This search is case sensitive. After entering search criteria, select the “Go” button. Below is an example of a search for events with names that contain “Commencement” and the new window that displays the results.

Events will only show up if the club has requested that it be visible on the web.



Click on the event name in the left column for more information.

[Skip to Content](#)
CAL POLY | **Events**
 Campus Master Calendar
[Quick Search](#) [Campus Map](#) [Calendar Tutorial](#)
[View Events by Category](#) [View Events by Venue](#) [View Events by Building](#)

New Quick Search

Event Name Contains
 Event Reference is
 Space Name Starts With

Results: Event Name Contains "Commencement"

Event Name	Event Title	Reference	Next Reservation	Organization
Asian American Commencement	Asian American Commencement	2008-AAKTZR	Jun 12 2009 12:00 PM	Multicultural Center (MCC)
College of Ed Commencement Ceremony	Spring 2009 Commencement	2008-AALGEU	Jun 13 2009 02:00 PM	College of Education (COE)
OCOB Graduate Programs Commencement	Spring 2000 Commencement	2008-AALGEX	Jun 13 2009 11:00 AM	College of Business (OCOB)
Liberal Studies Commencement Ceremony	Spring 2009 Commencement	2008-AALGFA	Jun 14 2009 03:00 PM	LS
AERO Post Commencement Ceremony	Spring 2009 Commencement	2008-AALEAX	Jun 13 2009 10:00 AM	112-AERO
CAFES Post Commencement - NRM	Spring 2009 Commencement	2008-AALBWG	Jun 14 2009 08:00 AM	College of Ag., Food & Env. Sci. (CAFES)
Social Sciences Commencement Reception	Spring 2009 Commencement	2008-AALDRS	Jun 14 2009 10:00 AM	865-SOCS
Black Commencement Committee	Black Commencement Committee: Ceremony	2008-AALBUZ	Jun 12 2009 04:00 PM	Black Commencement Committee

Initiate the E-Plan

The online E-Plan can be found at asi.calpoly.edu, under "University Union," "Club Services" and then "E-Plans".

[asi](#) | [Classifieds](#) [Jobs](#) [Forms & Policies](#) [Contacts & Hours](#) [Calendar](#) [Facility Reservations](#) [Register for Activities](#)

[About Us](#) | [University Union](#) | [Recreation Center](#) | [Children's Center](#) | [Student Government](#)


- ASI Events
- Business Services
- Club Services**
- Craft Center
- Rose Float

Your Club Hub

Clubs are an essential part of Cal Poly. With over 300 Clubs at your fingertips, it is easy to meet students who share the same interests as you do. Whether you're a club officer, an advisor, a member of an existing organization or looking to start a new club: here's where you'll find everything you need to know about club policies, procedures, services, and resources.

274

ASI Club Services on Facebook



Cal Poly Food and Science Club

[Club Directory](#) | [Club Funding](#) | [E-Plans](#) | [Forms](#) | [Handbooks](#) | [Important Updates](#) | [Online Training](#) | [Start a New Club](#)

- After selecting “online E-Plan”, the club member will be directed to the my.calpoly.edu portal to authenticate their signature.
- Once authenticated, they will be routed to the online E-Plan.
- To start a new E-Plan, select “Create a New E-Plan”.
- Pending what type of event is being planned, the requestor must select between the E-Plan Fast Pass, E-Plan Short Form, or E-Plan Long Form.

Welcome, mkelly05@calpoly.edu [CREATE A NEW E-PLAN](#)  [LOG OUT](#)

To create an E-Plan, click the link above. Any E-Plans which you have created or approved are listed below. Please make sure to LOG OUT using the link above when you have finished.

 Progress
 Messages
 Denied

Club Name	Event Name	Event Date	Advisor Approved Date	Type	Status	Options
<<Previous Next>>						

Welcome, mkelly05@calpoly.edu [LOG OUT](#) [E-PLAN HOME](#)

To begin the E-Plan process, please select your organization from the list below.

You may type in the first few letters of the club name to jump to its location.

Next, select the E-Plan type you would like from the list below.

The E-Plan **Long Form** must be submitted **14 days** prior to the requested date. The E-Plan **Long Form** can be used for all on or off campus events and **MUST** be used in the following instances:

- Off-campus events
- Events in large venues (Chumash Auditorium, UU 220, UU Plaza stage, Performing Arts Center, Spanos Theater, Mott Complex:)
- Events involving:
 - Contracts
 - Paid Service Providers
 - Travel
 - Alcohol
 - ASI Staffing

*Please check space availability at events.calpoly.edu prior to submitting a request.

Obtain Required Approvals

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

E-Plan, ASI Facility Scheduling will process the request. Final approval may take several weeks or more as we often rely on other campus entities for approvals.

Clicking the checkbox below indicates that I have reviewed the Cal Poly Club Handbook, and that I take responsibility to ensure that the activity my organization is sponsoring, described on this form, will abide by all University and ASI policies and procedures. Campus Administrative Policies can be viewed at policy.calpoly.edu. This E-Plan is negated if activities not included on this form occur.

Contact Signature
 If you are planning on printing this E-Plan to obtain a 'wet' signature from your advisor, it must first be saved.
 This E-Plan Long Form must be approved by the Club President and Club Advisor **14 days prior to the event date..**

[CANCEL](#)

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

Checking the Status of an E-Plan

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

Status: Pending President’s Approval

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

Welcome, mkelly05@calpoly.edu [CREATE A NEW E-PLAN](#) [LOG OUT](#)

To create an E-Plan, click the link above. Any E-Plans which you have created or approved are listed below. Please make sure to LOG OUT using the link above when you have finished.

Click to check the Status of the E-Plan

- Progress
- ▲ Messages
- Denied

Club Name	Event Name	Event Date	Advisor Approved Date	Type	Status	Options
Eplan Club: TEST	Test 1234	09-01-11		Long	<div style="width: 20px; height: 10px; border: 1px solid gray; background-color: white;"></div>	View

Status: Pending Advisor's Approval

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

Club Name	Event Name	Event Date	Advisor Approved Date	Type	Status	Options
Eplan Club: TEST	Test 1234	09-01-11		Long	<div style="display: inline-block; width: 10px; height: 10px; background-color: green; border: 1px solid black;"></div> <div style="display: inline-block; width: 10px; height: 10px; background-color: white; border: 1px solid black;"></div> <div style="display: inline-block; width: 10px; height: 10px; background-color: white; border: 1px solid black;"></div> <div style="display: inline-block; width: 10px; height: 10px; background-color: white; border: 1px solid black;"></div>	View

Status: Sent to ASI Facility Scheduling

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

Club Name	Event Name	Event Date	Advisor Approved Date	Type	Status	Options
Eplan Club: TEST	Test 1234	09-01-11	08-16-11 10:47 am	Long	<div style="display: inline-block; width: 10px; height: 10px; background-color: green; border: 1px solid black;"></div> <div style="display: inline-block; width: 10px; height: 10px; background-color: green; border: 1px solid black;"></div> <div style="display: inline-block; width: 10px; height: 10px; background-color: white; border: 1px solid black;"></div> <div style="display: inline-block; width: 10px; height: 10px; background-color: white; border: 1px solid black;"></div>	View Release


Status: Pending Campus Approvals

When three status bars are filled in, the ASI Facility Scheduling staff have entered the E-Plan into Resource 25, however they are waiting for confirmation from other on Campus entities (i.e Campus Catering, PAC, UPD etc.) before the E-Plan can be confirmed.

Club Name	Event Name	Event Date	Advisor Approved Date	Type	Status	Options
Eplan Club: TEST	Test 1234	09-01-11	08-16-11 10:47 am	Long	<div style="display: inline-block; width: 10px; height: 10px; background-color: green; border: 1px solid black;"></div> <div style="display: inline-block; width: 10px; height: 10px; background-color: green; border: 1px solid black;"></div> <div style="display: inline-block; width: 10px; height: 10px; background-color: green; border: 1px solid black;"></div> <div style="display: inline-block; width: 10px; height: 10px; background-color: white; border: 1px solid black;"></div>	View

Status: Confirmed

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

Club Name	Event Name	Event Date	Advisor Approved Date	Type	Status	Options
Eplan Club: TEST	Test 1234	09-01-11	08-16-11 10:47 am	Long		View

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

Risk Assessment and Policies

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

Contracting for Services

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

All contracts must be submitted to ASI Club Services for processing. All contracts must be provided to ASI Club Services at least two weeks prior to the event date for review and signature. If the contracting entity requires a certificate of insurance, the process will take at a minimum of 30 days. Depending on the nature of the event, certificates of insurance may take between 60 to 90 days. A contract will only be processed if an E-Plan is attached to the contract, or if an E-Plan is on file with ASI Club Services. Please note" contracts for certain events will not be approved by the University. Should the contract not be approved, you will be contacted by a Student Life & Leadership staff member for further instructions.

Income earned by individuals, and certain types of services are taxable and it is the responsibility of ASI to report to the IRS any such payments made by clubs to service providers. Any PRF submitted requesting a check for payment of a service must include a completed W-9 Form if one is not already on file with the University.

Off-Campus Activities

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

Private Vehicle Use for Events

When you choose to use your personal vehicle for club business, and state on your E-Plan that your club event will begin and end on campus, you must abide by the University's travel process. Drivers are required to submit a Volunteer Identification Request Form and a Request to Operate Vehicles on University Business Form prior to the trip. All forms can be found via the online E-Plan or the ASI website asi.calpoly.edu. For a complete look at the Cal Poly's travel policies and procedures, visit: http://www.calstate.edu/HRAAdm/Policies/csumv__policy_guideline.pdf

The University does not provide automobile insurance for individuals who choose to use their personal vehicles for club activities. Each student driving their private vehicle is required to have the minimum amount of automobile insurance required by the State of California and possess a valid driver's license. Drivers are recommended to carry automobile insurance with the following minimum limits: \$50,000/\$100,000/\$15,000. Drivers should consult with their insurance agent regarding recommended limits to protect personal assets. Also, the privately owned vehicle must be in safe condition and have seat belts for the driver and each passenger.

The University strongly recommends that clubs purchase the optional damage insurance whenever the club rents a vehicle for club use. The club member(s) who will drive the

rental vehicle must complete a Private Vehicle Form, obtain the club advisor's signature and submit the form to Student Life & Leadership prior to departure.

Travel

Student Travel Request

When a club is traveling outside of San Luis Obispo County, they must turn in a Student Travel Request. The Student Travel Request includes a Student Travel Request (CT – 1), a Student Transportation Request (CT – 2), and a Student Travel Plan Form (CT – 4a/b). This form must be completed and submitted 14 days prior to the event to ASI Club Services. These forms will indicate to the travel leader and club advisor where the club is going, the method of transportation, the roster for each vehicle traveling, lodging accommodations, and when the group will return.

Travel Binder

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

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

Travel officially begins when the club departs from the Cal Poly campus and ends when the group returns to San Luis Obispo County. If a participant wishes to depart from the club during travel and will not be returning with the club they need to complete a

Student Club Travel Sign – Out Agreement (CT – 5) prior to departing the group. Completed Sign – Out Agreements must be returned to Student Life & Leadership along with the Travel Binder when the club returns to San Luis Obispo.

When clubs travel on airplanes, Air Travel Waivers must be completed. Rental vans, and cars must be rented from Enterprise Rent-a-Car. If the club is carpooling and the participants will be driving, they must be listed on the Student Transportation Request Form (CT – 2).

California law restricts drivers for non-profits and certain other entities from the use of any vehicle that is built or designed to carry more than 10 passengers, unless they have the appropriate class B license. Drivers of vehicles of that class have a great deal of additional liability for the safe operation and maintenance of the bus and safety for all passengers on board as well as several other responsibilities. Effective immediately, the use of any vehicle within that particular class of passenger vehicles will not be approved.

Only participants who submitted their Volunteer form, Request to Operate Vehicle on State Business form, Copy of CA Drivers License and have a clean driving record are eligible to drive.

The clubs determine travel accommodations. Lodging accommodations must be listed on the Student Travel Plan Form (CT – 4a/b). If they change during travel the Travel Coordinator, Everette Brooks, must be notified. If an injury occurs during travel an injury report form must be completely filled out. Should an incident occur, an Incident Report Form must be filled out and submitted to Everette Brooks in Student Life and Leadership within 48 hours after the club returns.

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

Open Bodies of Water

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

Alcohol at Club Events

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

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

In addition, each arrangement must provide for the availability of popular non-alcoholic beverages for those persons less than 21 years of age. Students of legal age, while attending an off-campus University approved activity in the vicinity of a public bar, may not have their rights denied except by representatives of the licensee or by civil law enforcement authorities for cause.

If alcohol is available at an off-campus event, it must be noted on the club's E-Plan. In addition, any event involving alcohol at an off-campus location may require a meeting with Student Life & Leadership prior to the event taking place. If a meeting is necessary a representative from Student Life and Leadership will be in contact with an officer to schedule a meeting.

Under no circumstances may club funds be used to purchase alcohol, or to reimburse an individual for the purchase of alcohol, including the purchase of gift cards from companies that sell alcohol.

For more information on alcohol at off-campus events, please refer to Student's Rights and responsibilities web page (<http://www.osrr.calpoly.edu/alcoholpolicy/>).

Insurance on Equipment or Borrowed Items

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

If a Problem Does Arise at an Activity

For on-campus problems, contact Campus Police at 756-2281. If a problem develops off campus, call appropriate law enforcement or medical agencies in the area. If the personal safety of any club member, participant or spectator is endangered, professional assistance should be requested immediately. All problems must be reported directly and promptly to Student Life & Leadership at 756-2476.

University Activity Release Agreement

ASI and the University do not provide accident/medical insurance for club members. If an individual is injured at a club event he/she is personally responsible for related medical expenses. When clubs sponsor activities with the potential for injuries, participants are required to complete a University Activity Release Agreement. Release agreements are accessible via the online E-Plan and on the ASI website.

The Activity Release Agreement serves two important purposes: it notifies the participant that accident/medical insurance is not provided for the activity and it clarifies the responsibility of the individual, the University and the club in situations when injuries occur. Activity Release Agreements can be filled out at the event site, but they must be completed prior to the individual participating in the activity. The completed forms must be submitted to ASI Club Services prior to the event. Activity release agreements are kept on file for seven years after the event is completed.

The activity release agreement does not release clubs from the responsibility of providing a safe environment for the activity. Student Life & Leadership staff is available to provide risk management consultation during the event planning process. If there is any doubt as to the safety of an activity, please communicate concerns to an ASI Club Services or Student Life & Leadership staff member.

Ineligible Off-Campus Events and Activities

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

On-Campus Activities

Food Policy

For most events held on campus where food will be available, the food must be ordered from Campus Catering, and an application and orientation provided by Environmental Health and Safety will need to be completed. Events involving food will need to have an E-Plan on file. When the E-Plan is initiated, ASI Club Services staff will provide the club

with contact information for both departments and will notify them of the pending event.

If a vendor is willing to donate food for an event, a Request for Donation form must be submitted to the Campus Catering office a minimum of two weeks prior to the event for their approval. The product would have to be delivered directly to Campus Catering and meet safety and health standards.

For further information about campus food policies, contact Campus Catering at 756-1177.

Food Safety

All operations on campus that involve food must follow the Campus Food Services Policy. Please see www.afd.calpoly.edu/ehs/foodsafety.asp for additional information.

Alcohol Policy for On-Campus Events

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

Amplified Sound Policy

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

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

Sponsoring a Sporting Activity

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

Activities Involving State Officials and/or Potentially Controversial Speakers

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

Income-Producing and Fundraising Activities

The El Corral Bookstore Director or their designee must approve campus sale of goods that might be similar to merchandise available in El Corral Bookstore.

Raffles, including 50/50 raffles, are considered a gambling activity and are not authorized by the University. A 50/50 raffle involves participants purchasing a raffle

entry, and the sum of the proceeds being split between the hosting organization and the raffle winner.

Publicity

Posting and Distributing Printed Material On-Campus

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

- The E-Plan process must be used to gain approval to set up sandwich boards (flyers and stake signs do not require an E-Plan but are subject to the policies outlines below).
- The residence halls will only post flyers for events that have an E-Plan initiated. To have a poster advertising your event displayed in the halls, take 10 posters to the Residential Life and Education Office, located in Bldg. 31, Rm. 203, at least seven days prior to your event date. Due to limited space and fire safety concerns, one flyer per event will be posted in each hall. Posters must be on letter or legal sized paper only (no newsprint posters will be accepted). All posters will be reviewed by Housing and Residential Life for compliance to the policies listed in the Residence Hall Handbook. All posters must have the sponsoring club or department name clearly indicated.
- All posting will be done by residence hall staff. Unapproved flyers will be removed.
- Sandwich boards shall be no larger than 2'x 4'. The space for self-standing signs must be arranged through the E-Plan process. The signs cannot be on display for more than seven days prior to event and must be removed immediately following the event. All spaces for self-standing signs are assigned on a first-come, first-served basis.
- Posters/banners displayed in the University Union Plaza shall be no longer than 3'x9' and may be attached to the railing only by string or plastic twist ties. Paper banners may be affixed using blue tape available from the Facility Supervisor or the UU Information Desk. Posters/banners may not be chained or locked to the

railing, nor may they be affixed to concrete walls or railings. Banners may not be displayed for more than seven days. After seven days, the Building Supervisor will remove the banner and it will be stored for 30 days. If the banner has not been picked up after 30 days, it will be disposed of. Paper banners will not be saved.

- Clubs can make their own posters in the University Union Craft Center and charge paper fees to their account.
- In the Memorial Plaza area (between the UU and the Administration Building), freestanding signs and posters may be placed only on the grassy mound, and must be approved by Facility Services through the E-Plan process.
- Posting on the exterior of buildings, trees, fences, doors, steps, sidewalks, traffic signs, poles, trash cans, vending machines, cars, or in restrooms is prohibited.

Staked Temporary Signs:

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

Sandwich Boards for Recurring Events

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

- Maximum size for signs is 2' x 4'
- Maximum time is one quarter
- Signs may not be placed on lawns or shrub areas

- Signs may not restrict access to sidewalks or building entrances
- Signs must be maintained by the sponsoring group

Use of Electronic Message Board

Clubs are eligible to use the ASI electronic message boards to advertise events open to the entire campus community. The marquees may not be used to advertise club meetings. An E-Plan must be submitted and an Electronic Message Board Request Form submitted to ASI Club Services to reserve message space. All groups using the marquees are subject to the policies, parameters and restrictions outlined on the Electronic Message Board Request Form.

Distribution of materials in electronic format using University information technology resources must comply with the Responsible Use Policy (its.calpoly.edu/Policies/RUP-INT/) and other applicable University policies.

Posting and Distributing Materials Off-Campus

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

Free Speech Policy

For complete language of the campus free speech policy, please reference the Campus Administrative Policy at <http://policy.calpoly.edu/cap/100/cap140.htm>

ASI Club Services Contact Information

Location

University Union, Building 65, Room 203

Phone

805-756-5807

805-756-7587

Fax

805-756-7121

805-756-7121

Email

clubservices@asi.calpoly.edu

eplan@asi.calpoly.edu

Operational Hours for 2011-12

Monday, Wednesday, Friday

10a.m. – 2p.m.

Tuesday, Thursday

1 p.m. - 5 p.m.

Mailing Address:

Club name, Mailbox #

ASI- Epicenter

1 Grand Avenue

San Luis Obispo, CA 93407-0675

Important Phone Numbers

Cal Poly IT	756-7000
Campus Catering	756-1177 / (fax) 756-5953
Career Services.....	756-2501 / (fax) 756-1593
Counseling Services.....	756-2511 / (fax) 756-6525
Facility Services	756-2321 / (fax) 756-6114
Media Distribution	756-7198
Open House.....	756-7576
Student Academic Services	756-2301 / (fax) 756-5122
Student Life & Leadership.....	756-2476 / (fax) 756-5836
University Police.....	756-2281
Week of Welcome (WOW)	756-2487 / (fax) 756-5836