Student Club/Organization Handbook
2018-2019 Edition
# Table of Contents

Student Involvement Center Staff ........................................ 3
Why get involved? ......................................................... 4
Requirements for Club and Organizations .................................. 5
  How to start a new club or organization?
  How to gain active status for the year?
Fall Dates .............................................................................. 6

**EVENTS**

Event Guidelines .................................................................... 7
Facility Guidelines .................................................................. 8
Event Marketing ....................................................................... 9
Posting Flyers Policy .............................................................. 11
Maintenance, Setup, Audiovisual Requests ............................... 12
Aramark Catering .................................................................... 13
Police and Public Safety ......................................................... 15
Campus Walks/Runs ............................................................... 16
Event Planning Steps .............................................................. 17
Event Planning Checklist ........................................................ 18
University Support Staff Contacts ........................................... 20

**FINANCES and BUDGETS**

Finances and Budget ............................................................. 21
  Donations
  Overdrafts
  Distribution of Funds
  Taxes
SGA Budget Request Guidelines ............................................ 23
SGA Travel Funding Guidelines ............................................. 24
Fundraising ............................................................................ 25
How to do it on your own? ....................................................... 26
  How to check your account balance?
  How to spend your money?
  How to deposit money into your account?
  How to change information on the account?
  What can cause my account to be terminated?
  What happens to SGA budget money at the end of the year?
  How to close an account?
  How to charge admission to your event?
Budget Dates for Academic Year ............................................. 29
Local T-Shirt Vendors ............................................................. 30
Student Involvement Center

Staff

Who to contact for questions

Doris Munoz
Associate Dean of Students and Director of Student Involvement Center
Email- dmunoz@methodist.edu
Phone- 910-630-7022
Office is located in the Berns Student Center

Aly McKenna
Assistant Director of the Student Involvement Center
Email- amckenna@methodist.edu
Phone- 910-630-7292
Office is located in the Berns Student Center

Student Involvement Center Mission Statement
The mission of the Student Involvement Center is to provide meaningful, high quality out-of-class opportunities through programs and experiences that foster student leadership and leadership development, participation in student clubs and organizations, assist with the development of a healthy active lifestyle, and create involvement and service opportunities at Methodist University and in the greater community.

How can the Student Involvement Center help you? - Here are a few things they can do for you:
• Connect you with an Involvement Counselor to help you find what is the best fit for you
• Assist with providing for you your Co-Curricular Transcript
• Provide involvement opportunities throughout on campus and the off campus community
• Serve as your main connection to student involvement at Methodist University
• Provide a learning environment outside of the classroom
• Assist clubs and organizations with their needs.
Why get Involved?

“Students learn more and more when they are involved in both academic and social aspects of the collegiate experience.” – Alexander Astin

What does it mean to "be involved" on campus? - Methodist University offers many involvement opportunities through a wide range of clubs and organizations including:

- Academic Organizations
- Campus Service Organizations
- Cultural Organizations
- Fraternity and Sorority Life
- Honor Societies
- Leading and Governing Organizations
- Performing and Fine Arts
- Religious and Spiritual Organizations
- Sports/Recreational

Why should I get involved on campus? - When you get involved you have the opportunity to:

- Develop leadership skills
- Become connected to Methodist
- Make a difference on and off campus
- Gain a sense of achievement
- Make new friends
- Enjoy a variety of experiences
- Build your resume’
- Impress potential employers and graduate schools
- Have fun

How do I get involved? - Ask yourself the following questions:

- What are my current areas of interest?
- What is important to me?
- What is my passion?
- Where can I best contribute my skills and talents?
- What am I looking to gain from this experience?
- What activity best fits my schedule and availability?

How much is enough? - Only YOU can answer this question. Here are a few helpful things to remember:

- Your first priority is academics (classes, projects and assignments).
- Your activities should complement what you are doing in the classroom, not compete with them. That's why we call them CO-curricular activities as opposed to EXTRA-curricular activities.
- You should be having fun.
- You should be learning! If you aren't having fun and learning, you might want to reconsider your commitments.
- Don't commit unless you're sure you have the time to follow through.
- Take your time. Be choosy. Try to imagine how your activities will fit into your schedule and your life.
- Be honest with yourself and others about how much you really can balance.
Requirements for Clubs or Organizations

**How to start a new club or organization?**
A student club, organization, or honor society is defined as any group of students who organize themselves around a common purpose. If students wish to register a new club, organization, or honor society, they should talk with the Director of the Student Involvement Center.

Clubs and organizations must meet the following criteria for approval:
1. Must be approved by the Methodist University Student Government Association.
2. Register with the Student Involvement Center by filling out the SOC Application and meet with the Director of the Student Involvement Center.
3. Must have a written constitution.
4. Must have an active Methodist University Faculty or Staff member serve as the Advisor of the Organization.
5. Have a membership of ten or more Methodist University students.
6. Establish a SOC account through the Controller’s Office for appropriate funding purposes.
   (This will be done once the SOC Application is complete.)

**How to re-register a club or organization?** - MUST BE DONE EACH ACADEMIC YEAR
All student clubs and organizations must follow the following requirements to obtain “active” status for the academic year:
1. Must submit a Student Organization/Club (SOC) Agreement Update Form each academic year or as personnel changes are made within executive office or change of advisor. SOC Agreement Update Form can be found at [http://www.methodist.edu/clubs-and-organizations](http://www.methodist.edu/clubs-and-organizations)
2. Must have an active Methodist University Faculty or Staff member serve as the Advisor of the Organization.
3. Submit a roster of membership to the Student Involvement Center each semester or as membership changes.

All applications and forms can be found on the university website.
These guidelines are provided for the benefit of the students and the student organization and are intended to be followed completely. Failure to comply with any of the following guidelines may result in disciplinary action taken against the organization including but not limited to possible suspension of registration, events and/or use of facilities. Please also review the Student Handbook.

**Conduct:** The organization assumes full responsibility for the conduct of participants at the event. Any violation of University policy may subject the participants and/or the organization to disciplinary action by the University.

**Right to adjust:** The Director of Community Calendar and External Events reserves the right to determine the appropriate use of spaces within the Methodist University campus.

**Canceling your event** - If you need to cancel your event, please contact the Director of Campus Calendar and External Events as quickly as possible. The event requestor is also responsible for canceling all food service items ordered, maintenance setup requests, special parking, and audio/visual requests. The event requestor will be responsible for costs incurred due to not canceling food service, maintenance and public safety services. You can contact the Director of Campus Calendar and Events at 910-630-7062 or universityevents@methodist.edu.

**General guidelines**
Below is a list of general event guidelines and specific information on designated facilities. This list will help ensure a successful event.

- No passageways, exits, defibrillators, or fire protection equipment may be blocked or obscured in any way.
- Gambling, alcoholic beverages and weapons are prohibited.
- Smoking is only permitted outdoors in designated locations and must be 50 feet or more away from campus buildings.
- All facilities must be left in the condition in which they were found.
- Do not adhere items to walls, ceilings or floors without approval from the Director of Community Calendar and External Events. Please place approved fliers in designated posting locations specific to each building.
- Glitter is not to be used in any facility for decoration.
- All decorations must be removed immediately following an event.

Every event is unique and requires a different setup. Methodist University offers free setup requests for internal and preferred community partner events. We currently offer tables, chairs, risers, trash cans, portable sound systems and other items as available.
BERNS STUDENT CENTER- Please follow the reservation process for using Berns.

- Contact Doris Munoz, Director of Student Involvement, for use of the stage, lights, backdrop and black padded chairs.
- Sound equipment can be coordinated through the Audio/Visual. Maintenance request items (tables, additional chairs, electricity, etc.) can also be coordinated through the Maintenance Request process or through the active data calendar system.
- All furniture must be reset to the original location.
- Please remove all fliers and publicity.

REEVES FINE ARTS BUILDING/HUFF CONCERT HALL- Please follow the reservation process for using Reeves Fine Arts Building/Huff Concert Hall.

- A technical rider must be sent to Huff Concert Hall Production Manager at least two weeks prior to the event. Information included in the rider should include: rehearsal times, event times, # of microphones needed, specific stage lighting requirements, backdrop information, stage setup, audio/visual requirements (projector) and a copy of the program.
- Please contact maintenance at least two weeks in advance if a power tie-in is required for your event.

OUTDOOR FACILITIES- Please follow the reservation process for using outdoor locations.

- Contact maintenance at least one week in advance for setup requests (tables, chairs, tents, trash cans, electricity, and water supply) or through the active data calendar system.
- Contact Public Safety for parking, after hours support, turning on outdoor lighting, blocking of parking spaces, and security or through the active data calendar system.
- Please be sure to clean up after your event. Please tie all trash bags after event completion.

ATHLETIC FACILITIES
Athletic facilities include: soccer field, football field, track, Riddle Center, tennis courts, baseball field and softball fields. Athletic facilities must follow the reservation process and be cleared by the Senior Associate Athletic Director, DeeDee Jarman.

- Only rubber sole shoes may be worn for events using the Riddle Center floor.
- Use of the Riddle Center tarp must be cleared by the Director of Campus Calendar and External Events.
- Please request the tarp at least two weeks prior to your event. Please note, placement of the tarp requires. One day of setup and one day of teardown in addition to your event.
- Event requester is responsible for securing event staff.
- Athletic teams will have first priority of all athletic facilities.
- Nimocks Fitness Center reservations must follow the reservation process and be cleared by the Director of Campus Recreation and the Director of Campus Calendar and External Events. Use of the Nimocks Fitness Center is primarily for general student recreation and will only be scheduled for private events after receiving approval from the designated personnel. Please note, placing of the Nimocks carpet requires 2-3 days of setup and 2-3 days of teardown.
Event Marketing

Request Design Services
The University Relations Department can develop brochures, ads, cards, invitations, fliers, and a press release for your next event. To request these services, please follow the steps listed below. Marketing Services Guide: http://www.methodist.edu/pub_media/pdfs/marketing.pdf

- Contact the Associate Vice President of University Relations or the Graphic Designer to request design services.
- Follow lead times as listed in the marketing services guide
- Place a print request with Monarch Press (follow lead times listed in services guide)

Advertising Placement
Your event may be advertised via print, broadcast, or online at the discretion of the Methodist University Marketing Department. All specially requested advertising expenses will be billed to the department requesting advertising services. Please follow lead times as listed in the marketing services guide.

Methodist University Website
To place your event on Methodist University’s website event calendar, please send the following information to the webmaster at webmaster@methodist.edu.

- Event Name
- Date
- Location
- Starting Time
- Admission Information
- Contact for event: Phone Number and E-mail
- Summary of Event

All events will be reviewed and placed on the MU website at the discretion of the webmaster.

E-mail Blasts
If you would like to send an e-mail blast to Methodist University faculty, staff, or students, please send the event information to the Webmaster. All events will be reviewed and sent at the discretion of the Webmaster.

Event Photography
To request a campus photographer for your next event, please contact the Vice President for Advancement & University Relations.

Event Signage
Methodist University sets high standards for all signage on campus. If you would like to have a sign(s) or banner(s) for your next event, a request must be made through the Office of University
Relations. All signs and banners must adhere to local laws and the Identity Standards Manual found through this link. http://www.methodist.edu/pub_media/standards.htm

**Areas that University Relations covers:**
- In-ground & permanent signage, such as directional signs, inside of buildings and exterior building signage
- University light pole banners
- If a sign, banner or flier is used directly for a student activity, event, or club, it must be approved through the Student Affairs office located in the Berns Student Center

**Entrance Sign**
In addition to the signs listed above, Methodist University community members also have the opportunity to have a welcome banner made for the posts near the main entrance on Lowdermilk Drive. A schedule for using this location will be kept through the University Relations Office.

Below are the steps for using the entrance banner location:
1. Contact Grimaneza Grasser (910.630.7507 or ggrasser@methodist.edu) to check the date availability.
2. The University Relations office can assist in creating & printing your banner by following the Design Services information. The banner must be either 4’ x 6’ or 3’ x 5’ to fit in the location. You can choose to have your banner created & printed off campus. Please have the proof approved via University Relations prior to sending it to be printed. Please allow at least three weeks for production.
3. The cost of the banner will be handled through the client’s budget
4. Please coordinate hanging the banner with Grimaneza Grasser. Please send specific times required for setup and tear down.

Examples of this banner include: Welcome Board of Trustee’s, Congratulations on Conference Championships, Ethics Bowl Champions, Welcome United Methodist Women, etc.
Posting Flyers Policy

To advertise your event via print, please have your poster or flier approved for posting by the Student Affairs Program Coordinator. This can be completed in the upper level of the Berns Student Union.

1. Posters, banners and flyers cannot contain offensive language or be demeaning to any individual or organization. They must be in good taste, and free from threat or violence.

2. All posters and flyers must be approved by the Office of Student Affairs or the Student Involvement Office before they are displayed. Please take in person or email to Doris Munoz (Director of Student Involvement) or Carol Pope (Program Coordinator for Student Affairs). This includes items displayed on tables in the dining hall and the Lion’s Den.

3. The Dean of Students or the Associate Dean of Students can refuse permission to display a flyer/poster if they feel that the content is inappropriate.

4. No posters/flyers may be put in Hensdale Chapel.

5. No posters/flyers may be put on glass windows or doors.

6. Sheet Signs are to be taken down within 24 hours of the event.

7. Posters/flyers cannot be attached to trees, light poles, or the bell tower.

8. All posters/flyers are only allowed to be hung with push pins or clear scotch tape in designated areas.

9. All posters/flyers must be removed within twenty-four (24) hours of the event.

10. Under no circumstance should flyers be placed on vehicle windows.

11. Posters and flyers should be posted on the bulletin boards provided for this purpose.

12. Posters/flyers that have not been approved, or that do not meet the guidelines above, will be removed.
Resource Request
The Methodist University Internal Event Coordinator can assist you with setting up your next event. If a setup is needed, the Faculty/Staff or Advisor of the organization requesting the venue is required to request all resources thru Active Data Calendar at least one week prior to the event. To request a setup, please place setup information in your initial event request via the Active Data Calendar system. If setup information is not available at this time or you have a specific setup need, please contact the Internal Event Coordinator at dsmithling@methodist.edu or by calling 910-630-7508 or 7238.
If you need to change a setup request, please contact the Internal Event Coordinator directly at 910.630.7508 or 7238.

Setup Notes
The Internal Event Coordinator will inform the requester if tables and chairs are not available for the event. The requestor will be responsible for securing rented tables and chairs if Methodist University cannot supply them.

- Round tables are not available outside the Alumni Dining Room without prior approval.
- Please be sure to include setup time on your next venue request. Most events require at least one hour. If food service is required, please reserve at least two hours for setup.
- If food service is present at the event, the requester is responsible for including and requesting the table needs for this additional service.
- In addition, if food service is present, all leftover food is to be removed by the user or caterer and disposed of in the dumpsters. Please do not dispose of leftover food in the room trashcans.
- Please be specific when writing your setup request.

Maintenance hours: Monday – Friday, 6:30am – 3:30pm
*Please be sure to inform the Internal Event Coordinator if your event is canceled*

Audiovisual Request
Methodist University is making tremendous strides in providing built-in audio/visual resources. If additional support is required, the University Relations department can provide audio/visual resources for your next event. Please contact the Production Coordinator at least 7 days prior to the event with your request. Please include the following information:

- Event Name
- Event Location
- Event Date
- Setup Time
- Event Start & Finish Time
- Support Requested (projector, sound system, microphone)
- Brief summary of the event

Production Coordinator: Dariene Zechman 910.630.7111 / dzechman@methodist.edu
Aramark Catering

Aramark is proud to be working in partnership with Methodist University to provide outstanding customer service, food, and experiences on campus through dining services. We look forward to serving each and every one of you! Please take an opportunity to view our catering website at http://methodistuniversity.catertrax.com.

All catering orders will be placed through this website. This online ordering system allows you to create a log in, view our menu options and pricing, place an order any time of day (and up to a year in advance), make changes to an order prior to the event, and store payment information securely. Each time an order is placed, an email is immediately sent to us. As the event approaches, we will contact you to confirm menu, guest count, times, and food quantities/selections. Please be advised that temporarily, Catertrax only works through using Google Chrome.

Below are some steps for using Catertrax:

- Once on the website, go to the top left hand side for Customer Login. If you have not already created a user account, please do so.
- Enter your information (name, address, department, etc.) and click continue.
- Once this is completed, you will not have to do it again – you will be able to log in using your last name and password you just created.
- Once you are logged in, you will see on the right hand side a box with a link that says.
- If you are a student and a faculty member is sponsoring and paying for your event, please enter the faculty member’s information under “Customer Information” and student information under “Delivery/Pick up Information”. An approval email will be generated and must be authorized by the remitting party. The event will not be approved or processed without this confirmation from the faculty.

Add/remove

- Online Wallet. This is where you can store credit card information for purchases. The website is secure and is PCI compliant. You can also store different credit cards, naming them different things, as you can charge orders to different cards as necessary. Please note that cards will not be charged until after the event has occurred and any adjustments have been made.
- When you click on the link, a box will pop up. You will select Credit Card for the Payment Method. Once you do this, another box will pop up and ask for the information on the credit card. This is where you will enter all the card information.
- Next, you will go back to the home page where on the right hand side you will click on Create New Order in order to start an order. (As you have orders in the system, you can also use the Manage Order and View My Catering links to see your upcoming orders that have already been placed). Click Create New Order to start the ordering process. You will be able to view all the menus available online. However, please note we are not
limited to the menus that are listed and are able to customize menus. Order the quantities and selections of food desired.

- This will take you through the process of ordering the product you want, and reviewing the order. Once you are done ordering, continue to event information by clicking Cart All Set? Click Here!
- On the next screen you will select the date of the event, delivery method, delivery contact, delivery phone, building, floor, room #/name, service ware option, food delivery time, event start time, event end time, and guest count. Then continue.
- Enter an Order Name at the top. Click Continue at the bottom.
- On the next screen select the Payment Method. Once that is completed, click Here we go!
- This will process your order and generate an e-mail to you.
- To make changes to an order once it is submitted, log into Catertrax. On the right hand side click
- Manage Orders. There you will view your current orders.
- In the far right column of each order, there is a box for Change with a brown envelope. Click that
- To make a change to that specific order. Once the envelope is clicked, the screen will show information that you are able to alter.

If necessary, add special instructions in the Special Instructions box. After the changes are made, click Send Change/Updated Request.

For any questions or concerns, you can email us via the Contact Us tab on Catertrax, call 910.884.0025, or e-mail the team at presley-joy@aramark.com

**For more specific assistance:**
Joy Presley, General Manager, presley-joy@aramark.com
Police and Public Safety

Event sponsors must utilize Methodist University Police and/or Security Officers for all events to which any of the following conditions apply:

- Any event for which 200 or more off-campus guests are expected
- Any event requiring dedicated vehicular or pedestrian traffic direction or management (in the judgment of the Methodist University Director of Police and Public Safety or his / her departmental designee)
- Any event for which an exhibitor, presenter or performing artist requires any security or law enforcement services as a contractual condition of appearance
- Any event offering “day-of” paid guest admissions
- Any event involving other on-site cash handling including, but not limited to, admission proceeds, merchandise sales, and collection of charitable donations. Exception: religious services at which participants make voluntary cash offerings
- Any event involving temporary restriction or closure of any university-owned roadway, service drive or parking area
- Any event that includes participants sitting, standing or otherwise congregating in any university-owned roadway, service drive or parking area
- Any event that includes participants walking, jogging, running, cycling, skating or otherwise traveling (individually or as a group) upon any university-owned roadway, service drive or parking area
- Any event featuring mechanical amusement rides or inflatable amusement structures
- Any professional or semi-professional athletic competition or exhibition
- Any event featuring boxing, wrestling or martial arts competition or exhibition
- Any event featuring live animals in lawful competition or un lawful exhibition

Contact the Department of Public Safety during business hours (910.630.7149) at least two weeks in advance of your event to request special event support from Methodist University Police or Security Officers. Only the number of University Police and Security Officers reasonably believed necessary to effectively and safely support an event will be assigned. However, the appropriate level of police and security staffing for any event will be determined by Methodist University’s Director of Police and Public Safety or his/ her departmental designee.

*Only Methodist University Police and Security Officers may direct or manage vehicular or pedestrian traffic on the Methodist University campus.

**Any exhibitor, presenter or performing artist who employs proprietary (or utilizes the services of contract) security / close protection personnel must provide advance notice of same to the Director of Campus Calendar and External Events and the Director of Police and Public Safety.
Proprietary or contract security/close protection personnel may not possess firearms or other weapons on Methodist University property at any time. Company/Private/Special Police Officers may not provide law enforcement or security services on Methodist University property unless contractually engaged by an authorized agent of Methodist University. Company/Private/Special Police personnel may not possess firearms or other weapons on Methodist University property at any time.

Campus Walks/Runs

Methodist University is a great place to host a community walk/run. The university receives many requests to host charity walk/runs (5K’s). Methodist University will follow the priority scheduling rubric for scheduling 5K events. A maximum of eight 5K run/walks will be scheduled during a calendar year. Additional requests beyond eight must receive approval from the Associate Vice President for Planning and Administration. A Charity Run/Walk requires specific planning.

The following are helpful notes for scheduling and planning a Charity Run/Walk.

- Public Safety must be notified for all Charity Run/Walks. Due to the nature of run/walk using a university owned roadway, Public Safety is required to staff the event.
- Please send a specific program/day of agenda to the Director of Campus Calendar and External Events at least two weeks prior to the event. Charity Run/Walks require temporary road closures. Timing and communication are vital for the safety of all participants.
- The preferred 5K route begins and ends in the Reeves Fine Arts Building parking lot using a counterclockwise loop around campus. Please coordinate the route with the Director of Campus Calendar and External Events and the Director of Public Safety.
- Please follow the process for maintenance setup requests and audio/visual needs.
- The University Relations Department can assist with marketing your next event. If any questions regarding advertising your event arise, please contact Sandy Ammons, Vice President of Advancement & University Relations.
Helpful Club/Organization Event Planning Steps

**Step 1—Assess resources**
Know what you have to work with before planning. Faculty and staff members, students, and community groups are all resources.

**Step 2—Assess needs and interests**
Who will attend? What are their interests? What are your goals? What needs are you trying to meet?

**Step 3—Brainstorm ideas**
Think of every type of event that might fulfill the goals. Don’t evaluate ideas at this point, just list all suggestions. Once this is done, review each idea and assess it for feasibility.

**Step 4—Develop a time line**
Make a list of everything that needs to be done to plan the event. Sometimes it’s easier to work backward from the date of the event to the present. Make a schedule that shows when each task needs to be completed.

**Step 5—Reserve space**
Over 100 organizations plus university departments compete for limited campus space for events. Reserve your space as early as possible.

**Step 6—Develop a budget**
Most likely you have a set amount of money available to spend on the event. List all associated costs and allocate the available funds. You may have to contact various departments for cost estimates associated with their services, including Huff Concert Hall and outdoor activities.

**Step 7—The paper chase**
Complete all the necessary paperwork including room reservations, workorders, catering submissions

**Step 8—The people chase**
Contact all the persons necessary for a successful event; performers, speakers, volunteers, and campus departments. Faculty/Staff member must be present at all MU Club/Organization related events. This includes on campus and off campus events. Police and Public Safety may require staff members to be present at your event, and must have advance notice to schedule these individuals to work.

**Step 9—Details**
Complete and confirm all details pertaining to the event.

**Step 10—The Event**
HAVE FUN!!

**Step 11—Evaluate**
Write a brief synopsis of the event, including participant and planner comments, attendance, suggestions for future events, and final costs.

**Step 12—Start planning the next event!**
## Club/Organization Event Planning Checklist

**TWO TO THREE MONTHS PRIOR**

<table>
<thead>
<tr>
<th>TASK</th>
<th>PERSON RESPONSIBLE</th>
<th>DATE COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Seek advisor’s approval &amp; assistance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Check campus calendar to avoid conflicts - <em>Director of University Events.</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Secure event location by reserving the facility through the Campus Calendar (REMEMBER – Secure a rain location if your event is outdoors)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Arrange catering needs through Aramark</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Coordinate any advertising, media coverage &amp; print materials required for event</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Secure transportation if required</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Develop an Event Budget and ensure you have adequate resources.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**FOUR TO SIX WEEKS PRIOR**

<table>
<thead>
<tr>
<th>TASK</th>
<th>PERSON RESPONSIBLE</th>
<th>DATE COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Confirm event staff/volunteers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Inform Public Safety if event requires staffing assistance or parking reservations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Develop advertising/promotional plan (posters, flyers, press releases, social media, etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <em>Have flyers approved for posting by Student Involvement or Student Affairs Offices.</em></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5. Send maintenance all setup requirements (tables, chairs, trash cans, grills, etc)

## TWO WEEKS PRIOR

<table>
<thead>
<tr>
<th>TASK</th>
<th>PERSON RESPONSIBLE</th>
<th>DATE COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Confirm audio visual, marketing, maintenance, catering and public safety requests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Confirm program schedule if event is held in Huff Concert Hall or Berns Student Center. Contact appropriate supervisor of any stage, lighting, sound, tech request.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- *Director of University Events for Reeves/Huff.*
- *Doris Munoz, Student Involvement, for Berns*

## ONE WEEK PRIOR

<table>
<thead>
<tr>
<th>TASK</th>
<th>PERSON RESPONSIBLE</th>
<th>DATE COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Confirm final guest count for catering with Aramark</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## DAY OF THE EVENT

<table>
<thead>
<tr>
<th>TASK</th>
<th>PERSON RESPONSIBLE</th>
<th>DATE COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Arrive early (1-hour recommended) to ensure setup request, AV needs and catering requests are in place</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## POST EVENT

<table>
<thead>
<tr>
<th>TASK</th>
<th>PERSON RESPONSIBLE</th>
<th>DATE COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>1. Remove all event signage, posters &amp; fliers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Ensure facility has been returned to the condition it was found</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Work with your advisor to arrange payment for all expenses incurred (catering, items rented, etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Evaluate your event.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
University Support Staff Contacts

Kayleen Smithling
Director of University Calendar and Events
Huff Concert Hall
910.630.7062

Michael Molter
Webmaster
mmolter@methodist.edu
910.630.7646

Mike Harrison
Director, Monarch Press
mharrison@methodist.edu
910.630.7061

Carol Pope - Flyer Approval
Program Coordinator, Student Affairs
capope@methodist.edu
910.630.7152

Bill Young
Maintenance, Dispatch
cwyoung@methodist.edu
910.630.7238

Janet Bird
Public Safety
jbird@methodist.edu
910.630.7554

Sheila Keen
Disbursements Manager
skeen@methodist.edu
910.630.7522

Gina Billman - Classroom Reservations
Administrative Assistant, Registrar’s Office
gbillman@methodist.edu
910.630.7037

Doris Munoz
Associate Dean of Students and Director of Student Involvement and Berns Student Center
dmunoz@methodist.edu
910.630.7022

Aramark
910.630.0065

DeeDee Jarman - Tailgating Spots
Senior Associate Athletic Director/Riddle Center
djarman@methodist.edu
910.630.7283

Public Safety
910.630.7098 - Non-emergencies
910.630.7577 – 24-Hour Emergencies

Maintenance
6:30 a.m. – 3:30 p.m. – 910.630.7199

After Hours Maintenance & Housekeeping
Notify Public Safety Staff
After 3:30 p.m. – 910.630.7098
Student organizations/clubs (SOCs) are required by university policy to establish and maintain their banking activities with the Controller’s Office through the use of an Agency Account. The University serves as an Agent for the benefit of the SOC and establishes a separate “Agency” banking account for depositing and disbursing funds owned by the individual SOCs. In addition, the Controller’s office provides basic accounting, monitoring, and reporting functions for the benefit of the SOCs and the SGA.

As a registered volunteer SOC, your group is recognized by the University as an independent and separate organization from the university and does not have access to the University’s tax exempt status. Registered Student Organizations/Clubs may access certain University-controlled benefits and resources, such as facilities and Equipment. They may seek grant funding from the Student Government Association (SGA) and are accountable to the University for compliance with University policies, regulations, and rules.

Any grant funds that an SOC receives from the SGA must be spent for the purpose for which it was awarded. The Controller’s Office keeps track of two balances for each SOC: the SGA grant balance and the “Other Funds” balance. The SGA grant balance consists of funds that have been granted to the SOC less approved expenditures of those grant funds. The “Other Funds” balance consists of any start-up funds that the SOC received plus any fund-raising funds that have been deposited to the account, less any expenditures that are allocated/charged to the account that can not be applied to an SGA grant. The total of these two balances equals the SOC account balance.

Agency accounts must update their account information at the beginning of the academic year and during the year if there is a change to officer(s) and/or advisor using the SOC Agreement Update Form. SOCs will not be eligible to receive SGA grants or to disburse funds until the completed form is received by the MU Student Involvement Center. The primary purpose of this form is to keep all departments apprised of any officer or advisor changes within the SOC in order to alleviate any delays with the approval process or funding of grants.

The approval and establishment of an Agency account does not:

1. Place the organization under the university’s tax exempt umbrella. Each organization is responsible for the preparation and filing of the IRS Form 990/990N (if applicable), or any other required forms.

2. Make the university liable for unauthorized actions of the organizations.
**Donations**
SOC accounts may receive gifts from donors. However, not all gifts will be tax-deductible to the donor. For a gift to be considered tax-deductible, it must be given to the University for the purpose of fulfilling its mission, rather than for the University to distribute to a specific beneficiary, association or student organization. Gifts made for specific individuals or associations, using the University as a conduit, are not considered charitable contributions to Methodist University, but belong to the individual or association, and are merely held by the University on behalf of the individual or association in an Agency Fund. The University cannot acknowledge such gifts as charitable contributions to the University. Management of Agency fund income and expenses is the responsibility of the individuals/groups, because they are not income and expenses of the University.

**Overdraft**
In the event an account becomes overdrawn, any future requests for disbursements from the account will be denied until the overdraft is corrected. All other expenditures will be processed, unless prohibited by law or any applicable university regulation.

**Distribution of Funds**
1. Disbursements from SOC agency accounts must be requested by a group officer or the organization’s faculty/staff advisor. All disbursements must meet the approval of two club representatives (i.e. officers) and two University representatives (i.e. advisor and dean/VP).

2. To ensure disbursements are applied to the proper agency account, disbursement requests must indicate both the SOC Name and its specifically assigned project number.

3. The approval process requirements are as follows:
   a. Academic Clubs – Approval is required from the faculty/staff advisor and the Dean. If the purchase is $3,000.00 or more, the VP for Academic Affairs approval is also required. Purchases of $5,000 or more require the additional approval of the VP for Business Affairs.
   b. Non-Academic Clubs – Approval is required from the faculty/staff advisor and the respective VP. If the purchase is $5,000 or more, the VP for Business Affairs must approve the request as well.

**Sales Tax**
Revenues from all fundraising activities are subject to North Carolina sales and use tax if tangible items, or admission tickets to events, are sold. Admissions fees are also subject to NC sales tax must be collected at the NC combined rate of 7% (4.75% for the state and 2.25% for Cumberland County). This can be done by either adding 7% to each item/ticket price, or by charging a set price and including sales tax in that price. Either way, signage must be displayed to inform the patron of the sales tax amount being charged.

In addition, the number, type and price of tickets sold must be tracked using the "Campus Activities with Admissions charge" form so that the Accounting Office can verify and calculate the amount of sales tax to be paid in to the state. Once this form is completed, please submit a copy of it with a copy of the Student Accounts Office receipt to the Accounting Office within 5 business days of the conclusion of the event.
When dealing with CASH

No funds in excess of $100 may be held by any individual group or department. Any monies collected by individual groups or departments should be submitted to the Student Accounts Office as soon as possible. All funds in excess of $100 are required to be deposited with the Student Accounts Office within a 24-hour period. Only change funds approved by the Vice President for Business Affairs are exempt from this 24-hour restriction. Any funds collected from fundraisers, theatre productions, sporting events, expense reimbursements, etc must be submitted to the Student Accounts Office. Maintaining such funds as a change fund in a desk drawer is inappropriate and is a violation of University policy. Collecting funds and disbursing straight from those funds is inappropriate.
Budget Request Guidelines

Clubs and Organization’s requesting SGA funding must submit a budget request at the start of every semester. The budget request should cover the expenses and needs for the entire semester. The following are guidelines to assist clubs and organizations with the requirements for which funding may and may not be requested. While these are guidelines, the SGA is the Finance Committee and has discretionary powers to allot funds as they see fit.

**Student Government Association will Fund:** (events MUST be open to the entire student body)
- Event Advertising, Decorations, Supplies, Prizes, Entertainment (bands, DJ’s, etc.)
- Guest Speaker Fees
- Promotional Supplies
- T-shirts for club members. (Limited to forty (40) shirts per club once a year at $8.00 each for a total of $640.00)
- Fundraising Supplies
- Conference Registration (up to 10 registration maximum fees no more than $100 each)
- Transportation (airfare, bus, van, parking, and gas)
- Lodging (based on quad occupancy)
- Campus Wide Events (Food/Beverage, Entertainment, etc.)
- Induction Ceremony for Academic Honor Societies

**Student Government Association will NOT Fund:**
- Affiliation Dues or Fees to national/regional/local organizations
- Clothing or supplies for personal use
- Office supplies, business cards, name tags
- Organization equipment
- Payment or reimbursement for gasoline for student cars
- Donations (funding to another third party organizations or agency)
- Food/Beverages for exclusive club events
- Entertainment that is not open to the campus community (shows, concerts, social gatherings, etc.)
Travel Funding Request Guidelines

Clubs and Organizations are allowed to submit a funding request for travel through their budget submissions at the start of each semester. All budget requirements must be complete in order for it to be reviewed by the finance committee.

**Clubs and Organizations must provide the following information:**
- Conference Registration Information (name of Conference, registration cost, location, dates, ect.)
- Transportation Quotes (provide quotes for airfare, van rentals, train tickets, or whatever means of transportation you will be taking)
- Lodging Quotes (provide a minimum of two quotes for lodging)
- List of Methodist University students who will be traveling
- Name of advisor/university official who will be traveling
- Method of payment while traveling (University Cooperate Card or Advisor/University Official P Card)
- Statement of how the travel is consistent with the purposes and constitution of the organization.

**Student Government Association will Fund**
- Conference Registration- (up to 10 registration maximum fees no more than $100 each)
- Transportation (airfare, bus, van, parking, or gas)
- Lodging (based on quad occupancy)

**Student Government Association will NOT Fund**
- Food/Beverages (meals)
- Entertainment (shows, museum fees, etc.)

**Advisor Travel Funding**
Student Government Association will only cover the expenses of 1 advisor/university official for every 12 students traveling. When submitting travel funding, clubs and organizations MUST add into their requested amount the advisor/university official expenses.

The following expenses will be funded for the advisor/university official-
- Conference Registration
- Transportation
- Private Lodging
- Food- $35 per day
Fundraising- Recognized student clubs and organizations can conduct fundraisers for the purposes of charitable donation or to enhance a student group’s budget. Fundraisers must follow the guidelines listed below and be approved in advance by the Vice President in the respective area.

**Guidelines**

- Only recognized student groups are permitted to engage in fundraising activities.
- The procedures for reserving and using university facilities apply to fundraising activities.
- A currently enrolled student member & advisor of the sponsoring organization must be present during the entire time of the fundraising activity.
- Fundraising activities must comply with all applicable federal, state, and local laws, rules and regulations.
- Sales tax must be charged on any items sold for a fundraiser.
- Fundraisers must also be in accordance with the Methodist University student handbook.
- Student groups must seek clearance from the charitable organization before seeking approval to fundraise on their behalf.
- All funds raised to supplement an SOC’s budget must be deposited to the respective Agency account.
- Organizations and individuals must request permission from the Vice President for Advancement and University Relations at least one month prior to the desired event.

**The following solicitations are not permitted:**

- Raffles
- Solicitation by credit card
- Door-to-door fundraising in Methodist University residence halls or owned, operated, and controlled property
- Fundraising for any candidate for political office
- Sale or distribution of items that violate the university Identity Standards Manual
- Solicitations of faculty, staff, students, and the community are not permitted without prior permission from the Vice President for Advancement and University Relations.

In order to maintain non-profit status, Methodist University must follow certain fundraising and gift recording guidelines as defined by the Internal Revenue Service. The University’s Office of Advancement and University Relations serves as the clearing-house for all external solicitations which include direct solicitations of individuals, corporations, and foundations for both in-kind and cash gifts including sponsorships.

Special fundraising projects such as car washes, bake sales, barbecues, or other functions in which donors receive a good or service in return for their support may or may not include a charitable contribution. When the gift exceeds the value of the good or service, the difference can be considered a contribution.
How to do it on your own?

**How to check your account balance?**
All organization advisors have access to agency account information via the MU Portal. Student officers should make any balance inquiries directly to their advisors.

In the rare instance that the advisor is not available, an organization officer may inquire in person in the Controller’s office. This individual must be listed on the most current SOC Agreement Update Form and have the club name and project code.

**How to spend your money?**

**Advisor Purchases** – Advisors are permitted to use their university P-cards to make purchases. However, if the advisor does not have a university P-card, they must use the MU Net Online Purchasing System to request a Corporate Card or Check Request. A check request is used by MU employees only as a last resort, when other methods cannot be used.

**Student Credit Card Purchases** – Credit card purchases may be made by the SOC treasurer and are limited to a maximum of $500.00 per request. The SOC Agency Account Disbursement Request Form must be completed and fully approved prior to checking out the card through the Corporate Card Administrator. The card, and all itemized receipts must be returned to the Corporate Card Administrator immediately after the purchase is made. The card is blocked after the requested charges are made to prevent further use. Requests to use the Corporate Credit Card for agency purchases over $500.00 must be made and purchased by the Faculty/Staff Advisor.

**Student Check Purchases** – Requests for checks should only be made only when the Corporate Credit Card cannot be used for purchases. Checks are issued on Tuesdays and Thursdays after 3:00 pm. The SOC Agency Disbursement Request Form must be completed, fully approved, and submitted to the Procurement office no later than noon the day prior to Tuesday or Thursday. Receipts must be submitted no later than ten (10) days after a check has been issued. If funds are advanced to a student through a check request, supporting documentation as well as any remaining funds must be submitted no later than ten (10) days following the advance. Further disbursements from the Account will be suspended until the required documentation is submitted.

**How to deposit money into your account?**
1. In accordance with University policy, all funds collected should be submitted as soon as possible, and any funds in excess of $100.00 are required to be deposited within 24 hours. Maintaining such funds as change funds in a desk drawer is inappropriate. Collecting funds and disbursing straight from those funds is inappropriate. Such actions, which are in direct violation of university policy, may subject your organization/club to revocation of status as a recognized SOC.

2. All funds raised and/or received for an Agency Account must be deposited in the Student Accounts Office. All deposits must be accompanied by a Project Deposit Slip; these are available in the Student Accounts Office, or can be found online on the MU Website.
3. To ensure credit is applied to the proper SOC agency account, deposit slips must indicate both the SOC Name and Project Number.

4. Please note that loose coins must be rolled.

**How to change information on the account?**

1. Organizations must submit a new Student Organization/Club (SOC) Agreement Update Form if any information should change. This may include but is not limited to, a change in officers, a change in advisors, or a change in organization name.

2. Inquiries, disbursements, or grant allocations will not be permitted without a current Student Organization/Club (SOC) Agreement Update Form.

**What can cause my account to be terminated?**

1. Accounts with no financial activity, including deposits or disbursements during the last two fiscal years shall be inactivated. Any remaining funds will be disbursed to the approved organization requested on the initial application form. In the event an organization has not been specified, all remaining funds will revert to the SGA fund.

2. Accounts that do not have a current Student Organization/Club (SOC) Agreement Update Form on file will be placed on hold. When placed on hold, organizations will not be able to disburse funds or receive any SGA funding.

3. Account’s that are over-drafted will be placed on hold and will be unable to disburse additional funds until the account regains a positive balance. The account is subject to termination if the overdraft remains unpaid for more than 90 days. Should the account be terminated, the organization will be required to reapply for a new agency account.

**What happens to the SGA grant money at the end of the year?**

At the end of each fiscal year an audit of SOC agency account balances will be conducted to ensure that SGA Grants are being fully utilized. SGA grant funds must be used in the year awarded. SGA grant funds may not be aggregated for spending in future years.

**How do you close an account?**

To close an unused account, either the advisor or dean on record must submit a written request to the Controller’s Office. Any remaining funds will be disbursed to the organization requested on the initial application form. If a beneficiary organization is not specified, any remaining funds will revert back to the SGA fund.

**We want to charge admission to our event, what should we do?**

If an admission charge is collected for a campus event, NC sales tax must also be collected at the NC combined rate of 7% (4.75% for the state and 2.25% for Cumberland County). This can be done by either adding 7% to each ticket price, or by charging a set price and including sales tax in that price. Either way, signage must be displayed to inform the patron of the sales tax amount being charged. In addition, the number, type and price of tickets sold must be tracked using the "Campus Activities with Admissions Charge" form so that the Accounting Office can verify and calculate the amount of sales tax.
to be paid in to the state. Once this form is completed, please submit a copy of it with a copy of the Student Accounts Office receipt to the Accounting Office within 5 business days of the conclusion of the event.
Local T-Shirt Vendors

The following are great vendors to use when ordering t-shirts, polos, and other promotional items.

Ted Michaud and Associates, Diana Michaud
910-822-6111
dianamichaud@tmaspromo.com

US Logoworks, Louis Feraca (MU Alum)
910-307-0312
louis@uslogoworks.com

Carolina Specialties International, Kelly Roy
910-568-9061
Kelly@carolinaspecialties.com

The Trophy House/Clark Sporting Goods, Shannon Chrismon,
910-323-1791
Shannon@thetrophyhouseinc.com