CLUBS & ORGANIZATIONS

A guide to understanding policies and identifying resources for recognized student clubs and student organizations
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RSO HANDBOOK Updated November 6, 2020
CONTACT INFORMATION

ASI Club Services

Clubs and Organizations
INTRODUCTION

This handbook is designed to assist all Recognized Student Organizations (RSOs) with understanding University policies, identifying resources available through the Clubs & Organizations Office and ASI Club Services and obtaining information that will help make your activities function efficiently. This handbook is not intended to be all-inclusive, and much of the information is in excerpt or abbreviated form. Most campus-based policies are maintained in Campus Administrative Policies\(^1\). However, there are many other policies and requirements applicable to RSOs, including system-wide CSU policies and executive orders.

If you have any questions or would like further information on a specific topic, please contact ASI Club Services or the Clubs & Organizations Office. Contents in this handbook are reviewed and approved by the Clubs & Organizations Office and Associated Students, Inc. (ASI). The contents of this handbook are subject to change.

TYPES OF RECOGNIZED STUDENT ORGANIZATIONS

At Cal Poly, there are three types of recognized student organizations: Clubs, Club Councils, and University Sponsored Organizations (USOs). This handbook uses the term “recognized student organization” or RSO when the content equally applies to all three types of recognized student organizations.

Clubs

Clubs comprise a majority of the Recognized Student Organizations at Cal Poly. Clubs must abide by the guidelines outlined under the Recognized Student Organization Recognition Process.

Councils

Cal Poly recognizes 10 student organizations as Cal Poly Club Councils. These councils are the governing bodies that represent a group of RSOs.

- Panhellenic Council (PHC)
- Interfraternity Council (IFC)
- United Sorority and Fraternity Council (USFC)
- Club Sports Council
- College Councils (CAFES, CAED, COSAM, CLA, ENG, OCOB)

A RSO is affiliated with PHC, IFC, USFC, or the Club Sports Council if:

- The RSO has been designated by the Clubs and Organizations Office as being a member organization of the council.

An RSO is affiliated with a college if:

- It is recognized as being “academic”, “honor”, or “professional” and
- It has gained approval from the dean of that college designated by the dean’s electronic signature on the RSO’s charter and
- It has been designated by the Clubs and Organizations Office as being a member organization of the council.

Note: RSOs affiliated with a college must also obtain the signature of the dean of that college on their charter.

Cal Poly Club Councils (the governing bodies) will be required to submit bylaws utilizing the Cal Poly Club Council Bylaw Template.

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\(^1\) Campus Administrative Policies (CAP) https://policy.calpoly.edu
University Sponsored Organizations (USOs) are student organizations that are affiliated with a national scholastic honor society.

University Sponsored Organizations invite members on the basis of scholastic achievement and may require skill-based, aptitude test requirements such as minimum grade point average, academic discipline, unit requirements, or classification (description as upper division, lower division, graduate student, etc.). University Sponsored Organizations must comply with all CSU system-wide policies, procedures, and guidelines in accordance with Student Activities Executive Order 1068. Please note that no students can be denied membership on the basis of age, disability, gender, genetic information, nationality, race or ethnicity, religion, sexual orientation, or veteran status.

**COVID-19 SAFETY PROTOCOLS**

RSOs must uphold all public health orders and guidance issued by federal, state, and local agencies.


It provides public health guidance and requires Institutions of Higher Education to “ensure that any organizations affiliated with the IHE, such as off-campus clubs, Greek organizations, etc., also follow these guidelines and develop systems to enforce and hold affiliated organizations accountable for adhering to this guidance.”

For the safety of your members, please ensure your organization adheres to the following state and university protocols, effective until further notice.

**Events**

RSOs may not host formal or informal events, activities, meetings, or gatherings in person - regardless of location - on or off campus. RSOs are strongly encouraged to convene and host activities virtually.

**Facility Reservation Requests**

Event Plans (E-Plans), the online platform for Recognized Student Organizations to submit meeting and event requests, are unavailable. Further, classroom and lab reservations are limited to support academic class instruction. In addition, ASI facilities are unavailable for reservations at this time.

**Travel**

RSO travel is suspended through June 30, 2021. The CSU Chancellor’s Office has extended all international and non-essential domestic travel restrictions for all CSU campuses and associated auxiliary organizations. This includes all Recognized Student Organizations.

**Adherence**

These requirements are in effect at all times and in all locations. It is critical for the health and safety of our campus community that everyone follows all COVID-19 related protocols, including physical distancing, proper wearing of face coverings, and following local ordinances related to gatherings. All students are expected to comply with these protocols.

Failure to follow the campus protocols will result in student conduct action, which could include suspension or expulsion. More information can be found on the Office of Student Rights & Responsibilities website.
CLUB OPERATIONS SUPPORT

Team members with the Clubs & Organizations Office and ASI Club Services are here to support you.

ASI Club Services Virtual Support

- ASI Club Services will be available virtually from 9 a.m. - 4 p.m. daily, with the opportunity to schedule a Zoom appointment with a staff member.
- ASI Club Services staff will also hold Zoom office hours. Availability and open office hours may vary. To see available times please visit https://www.asi.calpoly.edu/get-involved/club-services/virtual-services-club-services/

ASI Club Services In-person Support

In an effort to de-densify indoor operations, ASI Club Services will be operating out of the ASI Business Service Window until further notice. Services provided at the window include:

- Distribution of club mail and packages
- Collection and processing of club deposits

ASI Business Services is in a new location at the Ticket Office in the front of the Cal Poly Recreation Center (Building 43, in front of Poly Escapes and next to the Climbing Park). Open hours may vary. To see available times please visit https://www.asi.calpoly.edu/get-involved/club-services/virtual-services-club-services/

Clubs and Organizations Virtual Support

Clubs & Organizations team members will be available virtually from 9 a.m. - 5 p.m. daily, with the opportunity to schedule a Zoom appointment with a staff member. Availability and open office hours may vary. To set up an appointment, email clubs@calpoly.edu.

PRINCIPLES OF COMMUNITY

Cal Poly comprises a diverse community. Campus life and daily interactions are enriched by our acceptance and fostering of diversity and inclusivity in our community. Underlying Cal Poly’s educational goals and mission are basic values that include intellectual honesty; mutual respect; freedom from discrimination; and the abhorrence of intimidation, harassment, disruption or violence aimed at limiting these freedoms, or interfering with a student, faculty or staff member’s performance.

DIVERSITY

We affirm our positive commitment toward diversity, inclusive excellence, and basic values at Cal Poly through our mission statements, policies, and programs. We are committed to inspiring a student-centered multicultural community as a means of establishing an equitable educational community and an opportunity to Learn by Doing.

MEMBERSHIP

We encourage every student organization to make a conscious effort to undertake recruitment efforts to ensure diversity within the group’s membership and to take steps to reach populations currently underrepresented. Recruitment materials and activities should be designed to promote and embrace diversity.

Membership Development

Joining a recognized student organization should be a positive experience; therefore, membership development should focus on the positive aspects of both the organization and the individual. Groups should
carefully examine their screening criteria to ensure that it is inclusive of all students on campus. Abusive behavior toward, or hazing of, a member of the campus community is strictly forbidden. (Please see sections on Hazing and RSO Code of Conduct).

**FREEDOM OF EXPRESSION AND THE CAMPUS COMMUNITY**

Freedom of expression is a cornerstone of a democratic society and is essential to the educational process. Universities have a special obligation not only to tolerate but also to encourage and support the free expression of ideas, values, and opinions, even where they may be unpopular or controversial. Cal Poly accepts and embraces this obligation, recognizing that such expression may take a variety of forms such as speeches, signs, written materials, public assemblies, parades, demonstrations, and artistic representation.

Acknowledging the central role - the unfettered exchange of information and ideas, plays in learning and in a free society - the University shall ensure that individuals and groups are afforded wide latitude in exercising the right of free expression and that their constitutionally protected right to free expression is not abridged. Freedom of expression, however, is not an absolute right. It coexists with other rights and the need for lawful public order.

To ensure that exercise of the right of free expression does not interfere with University functions, imperil public safety, obstruct or damage University facilities, the University will establish and enforce campus regulations regarding the time, place, and manner of the exercise of free expression by individuals and groups.

The University recognizes that causing discomfort and even causing offense is not, of itself, a basis for limiting free speech. At the same time, all members of the University community should recognize that freedom of expression includes a responsibility to respect the dignity of others, and to acknowledge the right of others to express differing opinions.

We recognize the right to freedom of expression and challenge all students to express themselves in a manner that promotes and maintains the ideals of respect, equality, diversity, and freedom from unlawful harassment. While the University does not approve or disapprove student organization activities based on content or expression, student organizations are strongly encouraged to be sensitive in selection of event themes, costumes, t-shirt designs, and promotional materials that might portray an offensive or unintended stereotype based on race, color, ethnicity, culture, national origin, ancestry, citizenship, religion, gender, gender identity or expression, sexual orientation, disability, or other personal characteristic. Programs and activities should contribute to creating a campus community that is free of conduct that interferes with any person’s academic efforts or creates an unlawful hostile, intimidating, exploitative, or demeaning environment. A student or student organization that participates in unlawful harassment (see section on RSO Code of Conduct) is subject to University discipline. Anyone who believes their rights to freedom of speech or expression have been violated may submit a complaint to the Dean of Students Office.

**RECOGNIZED STUDENT ORGANIZATION CODE OF CONDUCT (RSOCC)**

All student organizations are required to be recognized by the University through a process administered by the Dean of Students Office and Associated Students, Inc. Recognized Student Organizations are subject to all University policies and rules and are responsible for the conduct of their members. Policies and procedures developed by external Greek councils or other external organizations are managed separately as outlined by their respective organizations and do not preclude action under this RSOCC.

In accordance with California State University (CSU) Executive Order 1068 2, Cal Poly’s president has the responsibility for implementing campus policies, procedures, and/or guidelines for student organizations and activities. This Recognized Student Organization Code of Conduct (RSOCC) is in compliance with EO 1068 and sets forth the Code of Conduct for Cal Poly Recognized Student Organizations (RSOs). All campus RSOs are

2 Executive Order 1068 [https://calstate.policystat.com/policy/6591312](https://calstate.policystat.com/policy/6591312)
subject to this Code of Conduct. This RSOCC complies with all student organization requirements described in Title 5 of the California Code of Regulations, Sections 41500 (Withholding Recognition), 41501 (Definition of Recognition), 41503 (Filing Requisites), and 41504 (Penalties); CSU Executive Orders 8684 and 11095 regarding Alcohol; CSU Executive Order 1068 (Student Activities); and Cal Poly Alcohol Policy6.

Authority and responsibility for administering this RSO Code of Conduct is delegated by the campus President to the Vice President for Student Affairs, the Dean of Students, and the Student Conduct Administrator.

Cal Poly is committed to maintaining a safe and healthy living and learning environment for students and employees. All campus community members should engage in activities that contribute toward this end. Student organization behavior that is not consistent with the RSOCC is addressed through an educational process that is designed to promote safety and good citizenship, and when necessary, impose appropriate consequences.

Conduct that threatens the safety or security of the campus community or substantially disrupts the functions or operation of the University is within the jurisdiction of this Code, regardless of whether it occurs on or off campus. Nothing in this code is intended to conflict with California Education Code Section 66301 that prohibits disciplinary action against students based on behavior protected by the First Amendment.

Equal Access

Cal Poly RSOs shall not discriminate either in the content of bylaws or in practice against any person on the basis of age, disability, gender, gender identity, genetic information, nationality, race or ethnicity, religion, sexual orientation, citizenship or veteran status7. The prohibition on membership policies that discriminate on the basis of gender does not apply to social fraternities or sororities.

Member Responsibilities

Members of RSOs are expected to be good citizens and to engage in responsible behaviors that reflect well upon their student organization and the University. Cal Poly has established this Code of Conduct to ensure that all student organization officers and members understand and accept responsibility for their actions, and the actions of their members and guests.

Application of This Code

The Office of Student Rights and Responsibilities (OSRR) will exercise jurisdiction over the conduct of all recognized student organizations, including fraternities, sororities, and sports clubs.

Action by the OSRR does not preclude action by one of the independent Greek councils, Associated Students, Inc., or other external governing bodies.

Sanctions for the conduct listed below may be imposed on student organizations found responsible for violating this RSOCC. The Office of Student Rights & Responsibilities uses a preponderance of evidence standard when making determinations regarding violations of this RSOCC in accordance with the policy and procedures set forth in CSU Executive Order 10988. Misconduct by members of student organizations may also subject the members, in their role as a student, to discipline under the CSU Student Code of Conduct. Individual student discipline is addressed elsewhere; this Code focuses on discipline against the organization.

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3 California Code of Regulations, Title 5, Section 41500, et seq. https://www.cde.ca.gov/ls/fa/sf/title5regs.asp
4 Executive Order 868 https://calstate.policystat.com/policy/6695942
5 Executive Order 1109 https://calstate.policystat.com/policy/6716728
6 CAP 172 https://policy.calpoly.edu/cap/100/cap-170
7 Executive Order 1068 https://calstate.policystat.com/policy/6591312
8 Executive Order 1098 https://calstate.policystat.com/policy/6743449
Interim Sanctions

The Dean of Students or designee may immediately impose interim sanctions where there is reasonable cause to believe that such an action is required to protect the health, safety, and well-being of members of the campus community, to protect University resources and property, and/or to ensure the maintenance of order. This may include, but is not limited to, cases involving hazing, incidents involving injury or violence, sexual misconduct, illegal alcohol or drug activity, or an ongoing pattern of serious violations. Interim sanctions may include a temporary suspension of official recognition and/or restrictions on specific activities including, but not limited to, social probation, participation in campus events, hosting activities, conducting meetings, and recruiting members. Interim sanctions may remain in effect until a final sanctions decision has been reached at the discretion of the Dean of Students or designee.

Procedure

OSRR has responsibility for handling all allegations of RSO misconduct on behalf of the University. When OSRR receives a report or information about a student organization’s alleged misconduct, an investigation may occur if warranted (as determined by OSRR). OSRR will send the president or chair of the student organization a written letter to schedule an informal conference as well as to notify the president or chair of the charges and the range of potential sanctions. Allegations involving discrimination, harassment, and/or retaliation based on a protected status, or allegations of sex/gender discrimination, harassment, retaliation, sexual misconduct, dating or domestic violence, or stalking, will be handled by the campus Title IX Coordinator/ DHR Administrator in accordance with the policy and procedures set forth in CSU Executive Order 1097, in coordination with OSRR.

During the informal conference, the Student Conduct Administrator will meet with the president or chair of the RSO to discuss the allegations and charges, as well as the proposed sanctions. The RSO president or chair may have one advisor of their choice. The RSO charged may elect to be accompanied by an advisor of their choice to a meeting, interview, or hearing regarding the allegations, subject to the same limitations set forth in Executive Order 1098 Article II. C (pertaining to individual student conduct proceedings). The advisor may not answer questions regarding the subject matter of the proceedings for the RSO charged. Where attorneys are permitted, the RSO charged may elect an attorney as an advisor. However, an advisor is limited to observing, consulting with, and providing support to the RSO. RSO Code of Conduct matters are not legal processes, and attorneys may not participate directly in the process. If the RSO is found responsible for misconduct by the Student Conduct Administrator, the Student Conduct Administrator will issue a written notice to the RSO president or chair setting forth the final charges and related sanctions. Outcome letters from the Office of Student Rights & Responsibilities are Administrative Actions and, therefore, are not required to be memorialized in writing by the RSO president or chair. An opportunity to speak into the proposed sanctions will be provided to the RSO president or chair prior to the office Outcome Letter being submitted. The University does not have an appeals process for RSOs.

The RSO president or chair may view their organization's disciplinary file by contacting the Office of Student Rights & Responsibilities. Organization conduct files will not be released during an open investigation. Conduct files may contain the following documents: photographs, supporting documents, memos, police reports, and official letters submitted to the RSO president or chair. Each case is unique, and not all files will contain each of these components. If necessary, the Office of Student Rights & Responsibilities may redact documents to protect any student/witness identities as appropriate. The University will not release the Student Conduct Administrator’s investigation notes. RSO disciplinary files must remain in the Office of Student Rights & Responsibilities and will not be sent to RSO president or chairs via email. These files will remain part of the RSO's indefinitely.

Unacceptable Student Organization/Member

The following conduct is unacceptable and may subject the student organization to disciplinary sanctions:

9 Executive Order 1097 https://calstate.policystat.com/policy/6742744
1. **Dishonesty**, including:
   a. Cheating, plagiarism, or other forms of academic dishonesty that are intended to gain unfair academic advantage.
   b. Furnishing false information to a University official, faculty member, or campus office.
   c. Forgery, alteration, or misuse of a University document, key, or identification instrument.
   d. Misrepresenting the organization to be an authorized agent of the University or one of its auxiliaries. Recognized student organizations and their operations are legally separate, independent organizations, do not represent the University, and are not agents of the University.

2. **Unauthorized entry** into, presence in, or use of any facility, property, or equipment owned or operated by the University or a University auxiliary organization, including but not limited to violation of visitation policies of University or University auxiliary owned or operated student residential facilities.

3. **Disruption.** Willful, material, and substantial disruption or obstruction of University operations, University-related activities or on-campus activities; or sponsoring or encouraging activity that substantially and materially disrupts the operations of the University or that infringes on the rights of members of the University community.

4. **Noise**
   a. Violation of municipal noise ordinances.
   b. Violation of municipal unruly gathering ordinances.
   c. Excessive noise which disrupts the campus or surrounding community, including violation of campus amplified sound policy, CAP 141.3.2.110.

5. **Obstruction.** Willful, material, and substantial obstruction of the free flow of pedestrian or other traffic, on or leading to or from campus property, or an off-campus University authorized activity.

6. **Disorderly Behavior.** Disorderly, lewd, indecent, or obscene behavior at a University-related activity, or directed toward a member of the University community.

7. **Health & Safety.** Conduct that threatens or endangers the health or safety of any person within or related to the University community, including physical abuse, threats, intimidation, harassment, sexual misconduct, throwing bottles or objects that could result in personal injury, or where three or more members of a student organization engage in group violence or taunt others to engage in violence.

8. **Hazing and Conspiracy to Haze.** Hazing is defined as any method of indoctrination, initiation, or pre-initiation into a student organization or student body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury to any former, current, or prospective student of any school, community college, college, university, or other educational institution in this state (Penal Code 245.611), and in addition, any act likely to cause physical harm, personal degradation, or disgrace resulting in physical or mental harm to any former, current, or prospective student of any school, community college, college, university, or other educational institution. The term “hazing” does not include customary athletic events or school sanctioned events. Neither the express or implied consent of a victim of hazing nor the lack of active participation in a particular hazing incident is a defense. Apathy or acquiescence in the presence of hazing is not a neutral act and is also a violation of this section.

9. **Drugs.** Use, possession, manufacture, or distribution of illegal drugs or drug-related paraphernalia (except as expressly permitted by law and University regulation) or the misuse of legal pharmaceutical drugs at an organization-related event or facility.

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10 CAP 141 [https://policy.calpoly.edu/cap/100/cap-140](https://policy.calpoly.edu/cap/100/cap-140)
11 California Penal Code 245.6 [https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=PEN&sectionNum=245.6](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=PEN&sectionNum=245.6)
10. **Alcohol.** Use, possession, manufacture, or distribution of alcoholic beverages (except as expressly permitted by law and University policy) or public intoxication while on campus or at a University-related activity (see Cal Poly's Alcohol Policy\(^\text{12}\) regarding on- and off-campus use, service, sale, and consumption for more detailed information).

11. **Theft or Misappropriation of University Resources and Property.**
   a. Theft of property or services from the University community, or misappropriation of University resources. Unauthorized removal of University property from common use areas.
   b. Possession by the student organization or presence at organization-related activities or facilities of stolen property or University property that has been removed without University authorization.

12. **Property Damage.** Unauthorized destruction, defacement or damage to University property or other property in the University community, including removal, alteration, or damage to University signs or banners.

13. **Weapons.** Possession, use, or misuse of firearms or guns, replicas, ammunition, explosives, fireworks, knives, other weapons, or dangerous chemicals at a University-related activity or at a student organization facility, function, or activity.

14. **Misuse of Computers.** Misuse of University computer facilities or resources, including:
   a. Unauthorized entry into a file, for any purpose.
   b. Unauthorized transfer of a file.
   c. Use of another’s identification of password.
   d. Use of computing facilities, campus network, or other resources to interfere with the work of another member of the University community.
   e. Use of computing facilities and resources to send obscene or intimidating and abusive messages.
   f. Use of computing facilities and resources to interfere with normal University operations.
   g. Use of computing facilities and resources in violation of copyright laws.
   h. Violation of a campus computer policy.

15. **Violation of Policies.** Violation of any University policy, rule, regulation, or presidential order.

16. **Commercial Purpose.** Unauthorized recording, dissemination, or publication of academic presentations (including handwritten notes) for a commercial purpose.

17. **Failure to Comply.** Failure to comply with directions or interference with any University official or any public safety officer while acting in the performance of their duties.

18. **Violations of Law.** Any organization-related act chargeable as a violation of federal, state, or local law that poses a substantial threat to the safety or well-being of members of the University community, to property within the University community, or poses a significant threat of disruption or interference with University operations.

19. **Violation of this RSOCC,** including:
   a. Falsification, distortion, or misrepresentation of information related to a student organization discipline matter.
   b. Disruption or interference with the orderly progress of a student organization disciplinary matter.
   c. Attempting to discourage a person from participating in a student organization disciplinary matter.
   d. Attempting to influence the impartiality of any participant in a student organization disciplinary matter.

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\(^{12}\) CAP 172 https://policy.calpoly.edu/cap/100/cap-170
e. Verbal or physical harassment or intimidation of any participant in a student organization disciplinary matter.
f. Failure to comply with the sanction(s) imposed under a student organization disciplinary proceeding.

20. **Aiding and Abetting.** Aiding, abetting, encouraging, permitting or assisting a student or student organization to do any act that would violate a University policy or applicable law or that could subject the student or student organization to discipline.

21. **Debts.** Failure of the organization to pay when due debts owed to the University or a University auxiliary organization.

22. **Discrimination.** Discrimination in membership policies on the basis of race, religion, national origin, ethnicity, color, age, gender, marital status, citizenship, sexual orientation, gender identity or expression, 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).

23. **Student Organization Events.**
   a. Failure to comply with event approval conditions imposed by the Clubs and Organizations Office or other University offices.
   b. Failure to comply with the policies governing student organization events held on campus or funded by the University or a University auxiliary organization.
   c. Failure by a fraternity or sorority to comply with the Event Registration Policy.

24. **Use of Cal Poly name and logo.** Unauthorized use of California Polytechnic State University or Cal Poly name, logo, or symbols, or use not in compliance with University policies and authorization.

**Sanctions**

Student organizations that violate the RSOCC are subject to sanctions. Sanctions may include, but are not limited to, one or more of the following:

1. **Withdrawal of recognition** – includes but is not limited to the student organization being denied use of University facilities, use of the University name, and use of Associated Student facilities and services. Withdrawal of recognition may be permanent, indefinite, or for a specified time.

2. **Suspension** – suspends all privileges granted to the student organization for a specific time. An organization under suspension must continue to fulfill the responsibilities required of the student organization and its respective governing council.

3. **Suspension of specific privileges** – suspends specific privileges of the student organization for a specific period of time.

4. **Suspension in abeyance** – places the organization on suspension, but the University does not implement the suspension. The organization retains privileges but must meet specified conditions. If the organization does not meet the conditions, the suspension immediately takes effect.

5. **Probation** – places the organization on probation for a period of time during which the organization is expected to demonstrate exemplary compliance with University policies. Probation may include conditions that the organization must meet to be removed from probation. The probationary conditions may specify the sanctions to be imposed should the organization not comply with the term(s) of probation.

6. **Reprimand** – states that the student organization’s actions were inappropriate and a warning that future infractions shall not occur.

7. **Restitution** – orders compensation for loss, damages, or injury that may include service, monetary, or material replacement.
8. **Educational and remedial sanctions** – orders attendance at education seminars by organization members or requires the organization to prepare presentation(s) to educate others.

9. **Social restrictions** – prohibits the student organization from holding social events for a specific period.

10. **Alcohol restrictions** – prohibits the student organization from having alcoholic beverages present at organization-related activities.

11. **Community service** – orders the organization to perform a specific number of hours of community service to be coordinated and/or approved by the Office of Dean of Students.

12. **Fines** – requires the student organization to pay fines not to exceed $1000, to be used for educational or charitable purposes or to be paid directly to a charitable organization or a designated University or Associated Students program.

**Recognition Reinstatement**

Student organizations with recognition suspended or removed for a specified period of time must make a formal written request to be reinstated to the Dean of Students or designee before recognition will be considered. If the sanction was a permanent removal of recognition, the RSO may not make such a request.

**SEXUAL MISCONDUCT**

*If any community member has immediate safety concerns, please contact the Police Department by dialing 911.* Sexual Misconduct (including sexual harassment as well as any sexual activity without **affirmative consent**, including but not limited to sexual assault, sexual battery, rape, acquaintance rape, stalking, domestic/dating violence as defined in Executive Orders 1095, 1096, and 1097) by students, employees or third-parties is a form of discrimination prohibited by University policy, and state and federal laws, including Title IX. Students may also have a right to file a concurrent criminal complaint for the same incident with law enforcement. It is important to note that the University’s administrative process is entirely separate from the criminal process, applying different procedures, standards of proof, and possible penalties.

- If you are a student, your rights are covered in Executive Order 1097.
- If you are an employee or third party, your rights are covered in Executive Order 1096.
- Executive Order 1095 contains general information.

**AFFIRMATIVE CONSENT & CAPACITY**

Affirmative Consent means an informed, affirmative, conscious, voluntary, and mutual agreement to engage in sexual activity. It is the responsibility of each person involved in the sexual activity to ensure Affirmative Consent has been obtained from the other participant(s) to engage in the sexual activity. Lack of protest or resistance does not mean Affirmative Consent, nor does silence mean Affirmative Consent. Affirmative Consent must be voluntary and given without coercion, force, threats, or intimidation. The existence of a dating or social relationship between those involved, or the fact of past sexual activities between them, should never by itself be assumed to be an indicator of Affirmative Consent. A request for someone to use a condom or birth control does not, in and of itself, constitute Affirmative Consent. Affirmative Consent can be withdrawn or revoked. Consent to one form of sexual activity (or one sexual act) does not constitute consent to other forms of sexual activity. Consent given to sexual activity on one occasion does not constitute consent on another occasion. There must

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13 Executive Order 1095 [https://calstate.policystat.com/policy/6741651](https://calstate.policystat.com/policy/6741651)
14 Executive Order 1096 [https://calstate.policystat.com/policy/6743499](https://calstate.policystat.com/policy/6743499)
15 Executive Order 1097 [https://calstate.policystat.com/policy/6742744](https://calstate.policystat.com/policy/6742744)
16 Ibid
17 Executive Order 1096 [https://calstate.policystat.com/policy/6743499](https://calstate.policystat.com/policy/6743499)
18 Executive Order 1095 [https://calstate.policystat.com/policy/6741651](https://calstate.policystat.com/policy/6741651)
always be mutual and affirmative consent to engage in sexual activity. Consent must be ongoing throughout a sexual activity and can be revoked at any time, including after penetration. Once consent is withdrawn or revoked, the sexual activity must stop immediately.

Affirmative Consent cannot be given by a person who is incapacitated. A person is unable to consent when asleep, unconscious, or incapacitated due to the influence of drugs, alcohol, or medication so that the person could not understand the fact, nature, or extent of the sexual activity. A person is incapacitated if the person lacks the physical and/or mental ability to make informed, rational decisions. Whether an intoxicated person (as a result of using alcohol or other drugs) is incapacitated depends on the extent to which the alcohol or other drugs impact the person’s decision-making ability, awareness of consequences, and ability to make informed judgments. A person’s own intoxication or incapacitation from drugs or alcohol does not diminish that person’s responsibility to obtain Affirmative Consent before engaging in sexual activity. A person with a medical or mental disability may also lack the capacity to give consent. Sexual activity with a minor (a person under 18 years old) is not consensual, because a minor is considered incapable of giving consent due to age.

It shall not be a valid excuse that a person affirmatively consented to the sexual activity if the Respondent knew or reasonably should have known that the person was unable to consent to the sexual activity under any of the following circumstances: the person was asleep or unconscious; the person was incapacitated due to the influence of drugs, alcohol, or medication so that the person could not understand the fact, nature, or extent of the sexual activity; or the person was unable to communicate due to a mental or physical condition. It shall not be a valid excuse that the Respondent believed that the person consented to the sexual activity under either of the following circumstances: the Respondent’s belief in Affirmative Consent arose from the intoxication or recklessness of the Respondent the Respondent did not take reasonable steps in the circumstances known to the Respondent at the time to ascertain whether the person affirmatively consented.

The use of alcohol or drugs does not make the complainant at fault for sexual misconduct. A complainant should not be deterred from reporting incidents of sexual misconduct out of a concern that there might be disciplinary charges for related violations of drug, alcohol, or other university policies. Except in extreme circumstances, complainants in sexual misconduct charges shall not be subject to discipline for related violations of the Standards for Student Conduct. Please note, this information above is summarized from the applicable policies, linked above.

How Do I File a Complaint?

All of the policies above contain complaint forms that may be filled out and field with the Office of Equal Opportunity and/or Title IX Coordinator, as appropriate: Completing a form is not necessary but it is an option. Complaints can also be taken verbally during an intake meeting with the Office of Equal Opportunity19.

You may file a complaint with the University using these processes and/or with University Police or local law enforcement.

Under the Executive Orders and mandatory reporting requirements set forth in state and federal laws, employees of Cal Poly, unless designated as confidential resources (i.e., hold medical licenses or work in medical offices or who have confidential resource certifications per Executive Order 109520) are mandatory reporters.

Where to Report

**OFFICE OF EQUAL OPPORTUNITY**
Location: Fisher Science, Building 33 Room 290

Maren Hufton, Title IX Coordinator
Phone: 805.756.1400 or email: mhufton@calpoly.edu

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19 Office of Equal Opportunity [http://equalopportunity.calpoly.edu/content/title-ix](http://equalopportunity.calpoly.edu/content/title-ix)
20 Executive Order 1095 [https://calstate.policystat.com/policy/6741651](https://calstate.policystat.com/policy/6741651)
Kaitlyn Blakey, Assistant Director
Phone: 805.756.1425 or email: kblakey@calpoly.edu

Julie Lewis, Assistant Director
Phone: 805.756.1044 or email: jlewis51@calpoly.edu

**CAL POLY UNIVERSITY POLICE**

Emergency: Dial 911
Non-emergency: 805.756.2281
https://afd.calpoly.edu/police/

**ON-CAMPUS OFF-THE-RECORD/UNOFFICIAL REPORTING**

Counseling Services at 805.756.2511; https://hcs.calpoly.edu/counseling
Cal Poly Safer at 805.756.2282; https://safer.calpoly.edu

**LOCAL POLICE**

San Luis Obispo Police
Emergency: Dial 911; Non-Emergency Police Services: 805.781.7317
Address: 1042 Walnut at Santa Rosa, San Luis Obispo, CA

**Medical & Counseling Services**

**CAL POLY HEALTH CENTER**

Location: Building 27 (next to the Campus Recreation Center)
Phone including after hours: 805.756.1211
Hearing or Speech Impaired: Call 711 (Telecommunications Relay Service)
Website: https://hcs.calpoly.edu; Email: health-counseling@calpoly.edu
Main Phone including after hours: 805.756.1211

**CAL POLY COUNSELING CENTER**

Location: Building 27, Room 136
Hearing or Speech Impaired: Call 711 (Telecommunications Relay Service)
Website: https://hcs.calpoly.edu/counseling
Both During and After Hours Psychological Emergencies - Phone: 805.756.2511
Local Crisis Hotline: 800.783.0607

**Support Resources & Interim Remedies**

The University encourages reporting to the Office of Equal Opportunity and/or local law enforcement. If details are not reported, the University’s response may be limited. Whether or not a student or community member chooses to report, reasonable interim remedies such as schedule changes, housing changes, and/or other academic accommodations may be arranged if requested. No-contact orders may also be requested. If you would like to discuss what happened in a confidential setting that will not trigger an investigation, you have several options:

**Confidential Resources for Complainants and Respondents**

**CAL POLY COUNSELING CENTER**

https://hcs.calpoly.edu/counseling
805.756.2511

**CAL POLY SAFER (ON CAMPUS)**
Note: Due to COVID-19 safety guidelines, effective until further notice, RSOs may not host formal or informal events, activities, meetings, or gatherings in person - regardless of location - on or off campus. RSOs are strongly encouraged to convene and host all activities virtually. The following information is intended for reference purposes, outlining requirements and protocols during normal operating conditions. Any and/or all of the reference event information that follows will be significantly altered or rendered invalid to coincide with federal, state, county, and university safety protocols. For specifics on Cal Poly safety measures related to COVID-19, visit the Cal Poly Coronavirus page at https://coronavirus.calpoly.edu/.

The goal of Clubs & Organizations and ASI 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.

Club Contracting for Services

Note: Because most contract submissions to the university are prompted by an agreement related to an event, and RSOs are not currently allowed to host in-person events due to COVID-19 safety protocols, few if any contracts will need to be reviewed by the university. For more information, contact clubs@calpoly.edu.

When a club enters into an agreement with a vendor or 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 the terms of the agreement. RSO officers and/or members are responsible for signing their own contracts and service agreements. The University does not sign contracts on behalf of RSOs, nor does the University advisor. It is the responsibility of the club and club officers to facilitate this review. Clubs and organizations hosting on-campus events that require a contract are required to submit a copy of the contract to the university for review prior to the event as a prerequisite for the approval process.

E-Plans

Note: Because RSOs are not currently allowed to host in-person events due to COVID-19 safety protocols, Event Plans (E-Plans), the online platform for RSOs to submit event requests, are unavailable. Further, classroom and lab reservations are limited to support academic class instruction. In addition, ASI facilities will be unavailable for reservation. The following information is intended for reference purposes, outlining requirements and protocols during normal operating conditions.

RSOs are required to submit E-Plans for on- or off-campus events, gatherings, and meetings. Social Fraternity & Sorority Life (FSL) organizations are not required to submit E-Plans for off-campus events but must provide information about off-campus events to FSL staff. ASI partners with the university to facilitate the E-plans process. An E-Plan serves as a tool for campus entities to coordinate and accommodate multiple campus events and assess each event for risk. All club events and meeting requests will be submitted via an online E-Plan. Any club member is able to create an E-Plan; the president and advisor will then be notified of the request via email and will be required to approve the request before it can be processed.

The E-Plan contains multiple deadlines determined by the event’s requirements and location; some events take more time to plan for than others. An event may require three business days, seven days, or 14 days based on event needs.
Event Timeline Requirements

3 BUSINESS DAYS
The E-Plan must be submitted and approved online by the club president and advisor at least three business days prior to the date requested for the following:

- General meetings (two hours or less) that take place in classrooms or UU Conference Rooms
- Sandwich Boards, Tri-fold Displays, Information Tables, or Booths (campus-wide)
- Events involving:
  - Amplified sound or music
  - Parking permits
  - Renting equipment
  - Chalking (campus-wide)

7 CALENDAR DAYS
The E-Plan must be submitted and approved online by the club president and advisor a minimum of seven calendar days prior to the date requested for the following:

- On-campus events and meetings (exceeding two hours)
- Events involving:
  - Food or drink
  - Sale of merchandise
  - Amplified sound/music
  - Chalking in the UU Plaza
  - Renting equipment
  - Showing a film/video
  - Use of Cal Poly names, symbols, or marks

14 CALENDAR DAYS
The E-Plan must be submitted and approved online by the club president and advisor a minimum of 14 calendar days prior to the date requested for the following:

- Off-campus events
- Events located in:
  - Chumash Auditorium
  - UU 220
  - UU Plaza Stage
  - Performing Arts Center
  - Spanos Theater
  - Mott Complex
  - Recreation Center
  - Sports Complex
- On-campus events involving:
  - ASI Staffing
  - Contracts
  - Paid Service Providers (such as guest speakers)
INITIATING THE E-PLAN

The E-Plan can be found on the Clubs and Organizations webpage. After selecting “E-Plans,” the club member will be directed to the Cal Poly portal to authenticate their signature. Once authenticated, they will be routed to the E-Plan. To start a new E-Plan, select “Create a New E-Plan.”

OBTAIN REQUIRED APPROVALS

While any club member may initiate an E-Plan, the E-Plan requires approval from the president and advisor listed on the current Charter. Once an E-Plan has been created, a notification will be electronically sent to the president requesting approval.

Once the president has approved the E-Plan, a notification will be electronically sent to the advisor requesting approval. The purpose of the advisor’s approval is to keep them informed about club event details. Once the advisor has approved the E-Plan, ASI Facility Scheduling will process the request. Final approval may take several weeks.

Note: The RSO president and/or 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 event dates. Although some requests require shorter deadlines, it is highly recommended to plan ahead.

CHECKING THE STATUS OF AN E-PLAN

The online E-Plan allows you to check the status of an E-Plan that you have previously 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 have been filled, the E-Plan has been submitted to the president for approval but has not yet been approved.

STATUS: PENDING ADVISOR’S APPROVAL

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

STATUS: SENT TO ASI FACILITY SCHEDULING

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

STATUS: PENDING CAMPUS APPROVALS

When three status bars have been filled, the ASI Facility Scheduling staff has entered the E-Plan into the facility scheduling system. However, they are waiting for confirmation from other on-campus entities (e.g., University Catering, PAC, and UPD) before the E-Plan can be confirmed.

STATUS: CONFIRMED

When all four boxes of the Status Bar have been filled, the E-Plan has been confirmed. This means that all requirements have been met and the event may occur as indicated.

21 E-Plans [https://clubs.calpoly.edu/events/e-plans](https://clubs.calpoly.edu/events/e-plans)
STATUS: DENIED

When any step in the E-Plan process has been denied, a red box will appear in the status bar. The RSO will need to submit a revised E-Plan with corrections to further proceed with the event.

Food Policy

*Note: Food preparation and distribution by RSOs will be dramatically impacted by the university requirement that RSOs may not host formal or informal events, activities, meetings, or gatherings in person - regardless of location - on or off campus. As a result of this protocol, no RSO may distribute food in a way that could be described as an event or gathering, such as in-person meetings, in-person social events, or hosting a booth or table for distributing food. All of these instances would be considered in-person events or gatherings and may not take place.*

Additionally, students may not gather in-person for the purpose of food preparation. The following information is intended for reference purposes, outlining requirements and protocols during normal operating conditions.

For most events held on campus where food will be available, the food must be ordered from University Catering or an approved off-campus caterer. A current list of university approved caterers can be found on University Catering's website. If an RSO wishes to use an off-campus caterer, an application and orientation provided by Environmental Health and Safety (EHS) may be required. Events involving food must have an E-Plan on file. When the E-Plan is initiated, ASI Facility Scheduling will provide the RSO with contact information for both departments and will notify the departments of the pending RSO event.

If a vendor is willing to donate food for an event, a Request for Donation form (which can be obtained at the University Catering office located next to The Avenue) must be submitted to the University Catering office a minimum of two weeks prior to the event for approval. Donated products must be delivered directly to University Catering and meet safety and health standards.

For further information about campus food policies, visit University Catering.

Food Safety

All events on campus involving food must follow the EHS Food Safety Policy.

Alcohol at Club Events

Alcoholic beverages are not to be served at off-campus functions by RSOs except when private service (i.e., for members and guests) is arranged by contract with a properly licensed third-party vendor or when hosted at a registered chapter facility by a Fraternity or Sorority recognized by Cal Poly. Club members may not serve or provide the alcohol themselves. Individuals at the event must purchase their drinks directly from the third-party vendor, leaving the club completely out of the alcohol transaction. Fraternities or Sororities hosting registered parties must also follow this guideline when contracting with a third party vendor or follow the guidelines for BYOB outlined in the Event Registration Policy. The facility or caterer must provide a valid Alcohol Beverage Control (ABC) license in order for the event to be approved. If a club is hosting an event at a location that does not already provide alcohol and an outside entity is hired to serve alcohol, the following is required:

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

In addition, each event 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

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22 Approved Off-Campus Caterers https://afd.calpoly.edu/cprm/procurement/catering/approved-caterers
23 University Catering https://www.calpolydining.com/catering/
24 EHS Food Safety Policy https://afd.calpoly.edu/ehs/foodsafety
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 E-Plan. In addition, any event involving alcohol at an off-campus location may require a meeting with the Clubs & Organizations Office prior to the event taking place. If a meeting is necessary, a representative from the Clubs & Organizations Office will contact a club officer to schedule the meeting.

Under no circumstances may club funds be used to purchase alcohol or to reimburse an individual for the purchase of alcohol (or purchase gift cards from businesses that sell alcohol). For more information on alcohol at off-campus events, please refer to the Office of Student Rights & Responsibilities25.

(See Cal Poly’s Alcohol Policy26 regarding on- and off-campus use, service, sale, and consumption for more detailed information. See also, Cal Poly’s Fraternity and Sorority Life Event Registration Procedure27 regarding registration of off-campus events where alcohol is present for more detailed information.)

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 an RSO through the E-Plan process and comply with any additional guidelines pertaining to a particular venue. Refer to Campus Administrative Policy (CAP) 14028 for more details about the campus-wide amplified sound policy.

In the UU Plaza, amplified sound may be used with allowed decibel rates beginning at 101 with spikes of 108, and may be used between 11:00 am and noon on Thursdays, during UU Hour. Amplified speech may also be used between 11:00 am and noon on Tuesdays in the UU Plaza.

Sponsoring a Sporting Activity

RSOs intending to sponsor a competitive sporting activity must submit a description of the activity and number of participants via the E-Plan process. The Clubs & Organizations Office is responsible for providing guidance and approval for sporting activities. All individuals participating in sporting events must complete a University Release of Liability to be submitted to the Clubs & Organizations Office.

Income Producing and Fundraising Activities

The Cal Poly Corporation Director of Retail and Concept Development or their designee must approve campus sale of goods that might be similar to merchandise available in the Bookstore.

Cal Poly Corporation
Building 15 / 805.756.5855

Raffles and Giveaways

RSOs are not permitted to hold raffles, including 50/50 raffles. However, giveaways are permitted. The distinction between raffles and giveaways is important for club officers to understand when completing paperwork as the two cannot be used interchangeably.

- **Raffle**: Selling raffle tickets to event participants for the sole purpose of being entered into a drawing to win a prize.
- **Giveaways**: Giving tickets to event participants at no charge and being entered into a drawing to win a prize.

25 Office of Students Rights & Responsibilities [https://osrr.calpoly.edu](https://osrr.calpoly.edu)
26 CAP 172 [https://policy.calpoly.edu/cap/100/cap-170](https://policy.calpoly.edu/cap/100/cap-170)
27 FSL Event Registration Procedure [https://greeklife.calpoly.edu/about/officer-resources](https://greeklife.calpoly.edu/about/officer-resources)
28 CAP 140 [https://policy.calpoly.edu/cap/100/cap-140](https://policy.calpoly.edu/cap/100/cap-140)
Insurance and Liability

INSURANCE

The Club Liability Insurance Program (CLIP) covers general liability for Recognized Student Organization claims made both on- and off-campus. Major exclusions include:

- Automobile Liability
- Alcohol furnished at Club Activities/Events
- Fraternal Organizations (men and women)
- Hazing
- Athletic activities
- Intentional discrimination

ADDITIONAL INSURANCE OPTIONS

If you are hosting an event that is not covered by CLIP (see major exclusions above), CSU Club Sports Insurance Program (Club Sports), or a national sponsoring organization (i.e Greek Life, etc.), you will be responsible for obtaining your own insurance as required by the off-campus venue when necessary. If a venue requires special event insurance, clubs may seek a third party insurer to purchase additional coverage for their event(s). Visit the Additional Insurance Options page for information on obtaining coverage.

CERTIFICATE OF INSURANCE

If you require a Certificate of Insurance from the University, email riskmanagement@calpoly.edu.

INSURANCE ON EQUIPMENT OR BORROWED ITEMS

ASI and the University do not have insurance coverage for equipment or other items borrowed for use by an RSO. RSOs have a responsibility to ensure that they are trained to use any rented equipment and to follow safety procedures.

RELEASE OF LIABILITY FORM

RSOs are responsible for their own activities and assume complete responsibility and liability for their activities. If an individual is injured or causes personal or property damages or other injuries at an RSO event, that individual is personally responsible for any related expenses and damages. When RSOs sponsor on-campus activities with the potential for injuries and/or damages, participants are required to complete a Release of Liability, Promise Not to Sue, Assumption of Risk and Agreement to Pay Claims Form (otherwise known as a Release of Liability Form). The Release of Liability Form serves two important purposes: it notifies the participant that liability/accident/medical insurance is not provided for the activity and it clarifies the responsibility of the individual, the university, and the RSO. Release of Liability forms can be filled out at the event site but must be completed prior to the individual participating in the activity.

A Release of Liability form does not release RSOs from the responsibility of providing a safe environment for the activity.

Off-Campus Activities

RSOs are required to submit an E-Plan for off-campus events.

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.

20 Additional Insurance Options https://clubs.calpoly.edu/additional-insurance-options
INELIGIBLE OFF-CAMPUS EVENTS AND ACTIVITIES

- Due to their high-risk nature, certain activities are not permitted to occur as RSO events. Ineligible activities include, but are not limited to: wine tasting, events at private student residences, and helicopter rides. The University, through the Clubs and Organizations Office will determine on a case-by-case basis whether an event or activity is deemed too risky.

STUDENT TRAVEL

Note: RSO travel is suspended through June 30, 2021. The CSU Chancellor’s Office has extended all international and non-essential domestic travel restrictions for all CSU campuses and associated auxiliary organizations. This includes all Recognized Student Organizations. The following information is intended for reference purposes, outlining requirements and protocols during normal operating conditions.

Clubs, with the exception of Club Sport teams that are represented by the Club Sports Council, are not required to submit paperwork for travel. It is recommended that clubs and organizations choosing to travel out of the country consult the Cal Poly International Center unless covered under a national sponsoring organization.

Club travel request forms are only required for Club Sport teams and clubs using university vehicles. Travel forms must be completed and submitted to Club Sports staff a minimum of seven days prior to travel.

Suggested Procedure for Incidents During Travel

- Should an incident, injury, or motor vehicle accident occur during travel, an incident report is suggested to be filled out and submitted to the Clubs and Organizations Office upon return to campus so that the University can offer support and resources for students.

If a Problem or Emergency Arises

For on-campus problems or emergencies, contact University Police at 9-1-1 or (805) 756-2281. If the personal safety of any RSO member, participant, spectator, campus community member, or visitor is endangered, UPD assistance should be requested immediately.

Additionally, all problems and emergencies should be reported directly and promptly to the Dean of Students Office at (805) 756-0327.

PROMOTIONS AND COMMUNICATIONS

Online Directory

The RSO Directory is an online database of all recognized Cal Poly RSOs. 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 RSO.

Email Account

Upon request, RSOs are given one email account and one entry in the campus directory server that redirects your messages to the email account. To set up these services, download the Request for a Cal Poly Email form found on the Forms & Resources page30. 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 RSO 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.

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30 Clubs Resources and Forms https://clubs.calpoly.edu/forms-and-resources

RSO HANDBOOK Updated November 6, 2020
includes soliciting, promoting, selling, marketing or advertising products or services, or reselling University resources.

Mail

MAIL SERVICES

The use of campus mail delivery services is limited to official University mail and interdepartmental correspondence and may not be used by clubs for mass mailings to faculty and staff. Under no circumstance are RSOs to use the ASI or University Bulk Mail Permits for either on or off-campus mailings.

MAILBOXES

Club mailboxes are available by request only. Clubs that are interested in having an on-campus address and mailbox must contact ASI Club Services to initiate the request.

Until further notice, any club that receives mail will be notified by email with instructions for pick up.

RSO mailing addresses must include the following information:

If an RSO receives a package ASI Club Services will notify the president and advisor by email. If the package is not picked up within two weeks, it will be forwarded to the advisor’s on-campus office. All mailboxes will be cleaned out at the end of the academic year. All mass mailings will be discarded, and any mail will be forwarded to the advisor.

Use of Cal Poly Name and Symbol

Use of the University’s name is a privilege reserved by law to the University and organizations officially recognized and authorized by the University and may not be used to imply, either directly or indirectly, the University’s endorsement, support, favor, association with, or opposition to an organization, product or service without the permission of the University

This includes, but is not limited to, use of the University name or marks in printed, electronic, or other such media. Unauthorized uses may constitute a violation of state law, trademark and/or copyright infringement.

Cal Poly requires any merchandise or items displaying the marks (i.e., name, symbol, brand, or logo) of the University to be purchased from a licensed vendor. The following list includes examples of Cal Poly marks that require approval. This list is not exhaustive.

- Cal Poly
- California Polytechnic State University
- Cal Poly abbreviations (e.g., CP, Poly)
- Mustangs
- Musty the Mustang Logo

RSOs are required to obtain prior approval from University Marketing before purchasing any items that display the university name or marks. Student representatives of RSOs can request approval via the Trademark Licensing Request Form. The Club Payment Request Form (PRF) includes an additional question regarding the use of Cal Poly marks. If the purchases being paid/reimbursed for on the Club PRF include the use of any Cal Poly marks, it must be indicated on the Club PRF and a copy of the approved Trademark Licensing Request Form must be included with the PRF.

Note: Failure to obtain approval and/or use a properly licensed vendor may lead to suspended privileges and/or not receiving reimbursement for unapproved purchases.

31 CAP 145 https://policy.calpoly.edu/cap/100/cap-140#cap-145
32 Approved Licensee List https://universitymarketing.calpoly.edu/trademark-licensing/
33 Trademark Licensing Request Form https://universitymarketing.calpoly.edu/trademark-licensing/request-form/
Eventbrite

- The Cal Poly Clubs and Organizations Office authorizes the use of Eventbrite by student organizations as a means of planning, promoting, and selling tickets to events.

Payments from Eventbrite must be issued in the form of a check payable to: ASI – Cal Poly Clubs. Include the club name on the memo line or in attached documentation. Submit payments to ASI Club Services 1 Grand Ave, San Luis Obispo, CA 93407-0675.

Posting or Distributing Flyers, Posters, and Banners

The University has a Campus Administrative Policy (CAP) regarding posting or distributing flyers, posters, and banners on campus.

Sandwich Boards

The University has a Campus Administrative Policy regarding sandwich boards. The E-Plan process must be used to gain approval to set up sandwich boards on University property. The maximum size for a sandwich board is 2’x4’. Sandwich boards cannot be on display for more than seven days prior to an event and must be removed immediately following the event. All spaces for sandwich boards are assigned on a first-come, first-served basis. Sandwich board reservations will be accepted at the following locations on campus: UU Plaza, Dexter Lawn, Via Carta Mall, and Ag Circle. Sandwich boards displayed at other areas on campus will be removed by Cal Poly Facility Services.

Sandwich Boards for Recurring Events

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

- Maximum size for signs is 2’x4’
- Maximum time is one academic 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

Banners in the University Union (UU) Plaza

The University has a Campus Administrative Policy regarding banners on campus.

Vinyl banners displayed in the University Union Plaza shall be no larger than 3’x9’ and may be attached to the railing using string or plastic twist ties. Paper banners may be affixed using blue painters tape available from the ASI Facility Supervisor. Banners may not be chained or locked to the railing, nor may they be affixed to concrete walls. Banners may not be displayed for more than seven days. After seven days, the ASI Facility Supervisor will remove the banner, and it will be stored in the UU for 30 days. If the banner has not been picked up after 30 days, it will be disposed of.

Staked Temporary Signs

- See CAP 144.6 for full details regarding the campus policy on temporary signage
- Letter-sized (i.e., 8.5" x 11") signs may be placed on redwood lath stakes
- Signs may not advertise events for longer than seven days
- Signs may not pose a safety risk

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34 CAP 140 https://policy.calpoly.edu/cap/100/cap-140
35 CAP 144 https://policy.calpoly.edu/cap/100/cap-140#cap-144
36 CAP 144 https://policy.calpoly.edu/cap/100/cap-140#cap-144
37 Ibid
• Signs may not be taped to, attached to or placed on buildings, trees, cars, traffic signs, posts, hillsides, trash cans, or on interior doors, windows, walls, floors or ceilings
• Signs may not obstruct entrances or exits of buildings or the line of vision to vehicular or pedestrian traffic
• Signs must clearly identify the name of the RSO sponsoring the activity
• The RSO responsible for placing temporary signage shall be responsible for its removal no more than two weeks after its posting, or if advertising an event, when the event is over
• In order to ensure maintenance of an uncluttered, attractive, and safe campus, the University otherwise reserves the right to remove temporary signage (commercial and non-commercial) if it is not in compliance with University Policy, if it has been posted for more than two weeks, or if the event it advertises has taken place, whichever comes first
• Signage may also be removed when damaged, displaced, or weather so that it is no longer readable
• Organizations or persons who fail to remove temporary signage in a timely manner may be held responsible for the cost of its removal
• Posting of temporary signage is subject to additional location-specific guidelines enumerated in CAP 144.6

Distributing Materials on Campus

See Cal Poly’s Free Expression policy in Campus Administrative Policy for more details on leafletting on campus.

University Housing will only post flyers for events that have an E-Plan initiated. To have a poster advertising your event displayed in the residence halls, take ten posters to the Residential Life and Education office, located in Building 31 Room 111, a minimum of seven days prior to the 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 (i.e., no posters will be accepted). All posters will be reviewed by Residential Life and Education for compliance with the policies listed in the Residence Hall Handbook and with CAP 140.

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.

RECOGNIZED STUDENT ORGANIZATION RECOGNITION PROCESS

RSOs shall:

• Operate within the laws of the State of California and the policies and procedures of the California Polytechnic State University and Associated Students, Inc. (ASI).
• 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 (the Clubs and Organizations Office).
• Keep all RSO funds in an ASI account unless the RSO is granted an exception.
• Annually submit a Charter to ASI Club Services.
• Have a faculty/staff advisor approved by the University via the Charter renewal process.
• Have a president and treasurer (as listed on the Charter) who maintain a minimum 2.0 grade point average both quarterly and cumulative, be in good academic standing, and not be on probation of any kind. A grade check will be conducted by the Clubs and Organizations Office for the president and treasurer at the end of each academic quarter.
• Keep a current copy of the bylaws on file with ASI Club Services.
• Annually submit a roster of all active members.

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38 CAP 140 https://policy.calpoly.edu/cap/100/cap-140
39 Ibid
Benefits of Official Recognition

- Use of Cal Poly’s name, logo, and symbols in conformance with campus policies.
- Use of campus facilities and equipment.
- Applying for and receiving ASI Club Funding, subject to availability and eligibility requirements.
- Scheduling and publicizing events through ASI.
- ASI Club Services support and resources.
- Maintaining an organizational mailbox.
- Participating in campus events as an RSO.
- Engaging in fundraising activities approved by the University and ASI.
- Receiving tax-exempt charitable donations through provisions administered by the Cal Poly Foundation.
- Certifying campus recognition for national and statewide affiliated organizations.

Starting a New RSO

The University, through the Clubs and Organizations Office, officially recognizes RSOs. ASI is a partner with the University in administering RSO services and support and the chartering and E-Plan process. Starting a new organization is a process that requires the participation of the prospective RSO, ASI Club Services, and the Clubs and Organizations Office, as outlined below.

- **RSO:** Ensure that no other club currently exists with a similar purpose.
- **RSO:** Find a minimum of five currently enrolled Cal Poly students that are interested in being a part of the RSO. 100% of the student organization membership shall be matriculated Cal Poly students.
- **RSO:** Find a full-time University (state) employee who would be willing to serve as the RSO’s advisor.
- **RSO:** Complete a Petition for University Recognition form and Bylaws using the bylaws template\(^{40}\).
- **RSO:** Submit the Petition for University Recognition form and bylaws to ASI Club Services for processing during the petition timeline. The schedule for petition review is available on the Start a Club page\(^{41}\).
- **ASI CLUB SERVICES:** Verify necessary documents are submitted and forward to the Clubs and Organizations Office.
- **CLUBS AND ORGANIZATIONS OFFICE:** Contact the potential club contact person to schedule a meeting.
- **CLUBS AND ORGANIZATIONS OFFICE:** Review bylaws and either approve or deny the process to continue. If denied, the Clubs and Organizations Office will notify the RSO contact.
- **ASI CLUB SERVICES:** Return bylaws to the RSO for revisions if necessary or notify the RSO that they are officially recognized by the University and the officers and advisor(s) can begin the online training.
- **RSO:** President, treasurer, and advisor complete the Online Training.
- **RSO:** Once training is completed, the president will receive the Charter via email.
- **RSO:** Complete Charter and obtain signatures from a minimum of two officers (president and treasurer) and an advisor, and submit to ASI Club Services for processing.

Note: Until the RSO receives confirmation of approved Charter, the RSO is not officially recognized as a Cal Poly RSO and therefore may not conduct any RSO business.

Renewing a Club Charter

The University, through the Clubs and Organizations Office, officially recognizes Cal Poly RSOs based on University standards and requirements, which include a current Charter. In order to remain active (e.g., maintain official recognition, access club funds, apply for ASI Club Funding, submit E-Plans), all presidents, treasurers, and advisors must complete online training annually; additionally, every RSO must renew its charter and submit a roster of all active club members each year.

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\(^{40}\) Start a Club [https://clubs.calpoly.edu/start-a-club](https://clubs.calpoly.edu/start-a-club)

\(^{41}\) Ibid
• The president is responsible for entering all relevant information into the Charter.
• The Charter must be completed and signed by all officers and advisor(s). A minimum of two different officers (president and treasurer) and one advisor are required.
• If the RSO is affiliated with a specific College, the RSO must also obtain:
  • Information and signature of a College Council Representative (an RSO member willing to attend College Council meetings of all RSOs affiliated with that College) and the College Dean’s signature.
  • A Community Service Representative position is listed on the Charter. The responsibility of this position is to organize and manage community service projects for the RSO. Although this position is not mandatory, the Clubs and Organizations Office recommends that this position be filled, allowing the RSO to better assist and promote its service projects.
• Once all signatures are obtained, the Charter is submitted to ASI Club Services for processing.
• ASI Club Services will verify completeness and forward the Charter to The Clubs and Organizations Office to check president and treasurer GPA and verify that the advisor is a Cal Poly State University employee.
• Note: The president and treasurer listed on the Charter must comply with the California State University definition of minor student representative officers provided by Executive Order 1068 and:
  o Be matriculated Cal Poly students;
  o Maintain a minimum overall 2.0 grade point average each academic year and a minimum 2.0 grade point average for the previous academic quarter.
  o Be in good standing and shall not be on probation of any kind;
  o Attend a minimum of 2 academic quarters during the academic year;
  o If undergraduate student:
    ▪ Earn at least 9 student credit units per quarter while holding office;
    ▪ Earn no more than 225 student credit units or no more than 125 percent of the units required for a specific baccalaureate degree objective, whichever is greater;
  o If graduate and credential student:
    ▪ Earn at least 4 student credit units per quarter while holding office;
    ▪ Earn no more than 75 student credit units or no more than 167 percent of the units required for the graduate or credential objective, whichever is greater.
• ASI Club Services will notify the president via email when the process is complete.

Online Training

The Online Training can be found on the Clubs and Organizations website.
• Only the president, treasurer, and advisor are required to complete the online training. Each training takes approximately 45 minutes to complete.
• The training does not have to be completed during one session, as long as the officer/advisor resumes the training using the same computer and browser.
• Once all required positions have completed the training, ASI Club Services will email the president a Cal Poly RSO Charter within five business days of the last person completing their online training.

Roster

All recognized student organizations are required to provide a roster of all active club members with their charter renewal.

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42 Club Officer Training [https://clubs.calpoly.edu/club-training]
Insurance for Social Fraternity & Sorority Life Organizations

Social Fraternity & Sorority Life Organizations must provide a Certificate of Liability Insurance. Coverage must be current and include Commercial General Liability Coverage of $1,000,000 per occurrence; $2,000,000 aggregate. Submit proof of insurance to the Fraternity & Sorority Life office.

Updating Bylaws

When an RSO wishes to update their bylaws, new bylaws must be submitted using the Bylaw Template. A copy of the RSO’s current bylaws is available from ASI Club Services, should the RSO need them as a reference.

To update bylaws, the following must be submitted to ASI Club Services:

- A digital copy of the RSO’s new bylaws.
- A completed Bylaw Amendment Request form. Once these items have been submitted, the changes will be reviewed by the Clubs and Organizations Office. If approved, the RSO will be notified and the necessary changes will be made to the RSO’s file.

RSO Name Changes

When changing a RSO name, new bylaws reflecting the name change must be submitted using the Bylaw Template found on the Start a Club page. A copy of the RSO’s current bylaws is available from ASI Club Services should the RSO need them as a reference.

To request name change, the following must be submitted to ASI Club Services:

- A digital copy of the RSO’s new bylaws (updated with the RSO’s new name).
- A completed Name Change Request form. Once these items have been submitted, the changes will be reviewed by the Clubs and Organizations Office. If approved, the RSO will be notified and the necessary changes will be made to the RSO’s file.

Note: Once the RSO name change is approved, the RSO will be required to submit a new Charter that reflects the new RSO name.

Inactive RSOs

After two years of inactivity, defined by non-renewal of an RSO Charter, funds of dissolved RSOs will be added to ASI Club Funding for the following academic year. If the RSO reactivates, club members may petition the ASI Board of Directors for the return of the funds.

Adding Additional Officer(s)/Advisor(s) to an Existing Charter

When a RSO wishes to add additional officer(s)/advisor(s) to a Charter without removing any current officer(s)/advisor(s), the RSO can begin the Add to Charter process as outlined below.

- The RSO must notify ASI Club Services so that an Add to Charter form can routed for signatures.
- Upon receiving the Add to Charter form, the president and new officer(s)/advisor(s) will need to sign the Charter. The only signatures needed are those of the new officer(s)/advisor(s) and the president (the current advisor’s signature is not required).
- The revised Charter is submitted to ASI Club Services for processing.
- Once the chartering process is completed, the president will be notified by ASI Club Services by email.

43 Start a Club https://clubs.calpoly.edu/start-a-club
44 Club Forms and Resources https://clubs.calpoly.edu/forms-and-resources
45 Start a Club https://clubs.calpoly.edu/start-a-club
46 Club Forms and Resources https://clubs.calpoly.edu/forms-and-resources
Note: New officer(s)/advisor(s) will not be able to sign any paperwork until the Charter has been approved by the Clubs and Organizations Office.

Note: RSOs have the ability to add as many officers to their Charter as desired. While the Charter states specific officer titles (e.g., President, Vice President, Secretary), this does not mean that those are the only officer positions an RSO can have on file. To add another officer position with a different title, email ASI Club Services listing the officer name(s), Cal Poly email address and the desired officer titles (e.g., Chair, Historian, Social Media Coordinator). Replacing an Officer(s)/Advisor(s) on an Existing Charter

When an RSO wishes to replace officer(s)/advisor(s) on a Charter, the RSO should begin the Replace Charter process. This should be done using one of the two options outlined below.

**OPTION ONE: NEW PRESIDENT, TREASURER, AND/OR ADVISOR COMPLETE ONLINE TRAINING**

The new president, treasurer, and/or advisor complete the online training on the Clubs and Organizations website (as described in the Online Training section earlier in this chapter). Once all training requirements are complete, a Replace Charter form will be emailed to the new president, treasurer, and/or advisor for signature. The completed charter will be submitted to ASI Club Services for processing. Once the chartering process is completed, the president will be notified by ASI Club Services by email.

This option must be followed when replacing all three positions (president, treasurer, and advisor). However, this option can be used even in the case of replacing a single position.

Note: New officer(s)/advisor(s) will not be able to sign any paperwork until the Charter has been approved by the Clubs and Organizations Office.

**OPTION TWO: NEW OFFICER (I.E. PRESIDENT, TREASURER, OR ADVISOR) NOTIFIES ASI CLUB SERVICES**

This option is used to replace a single officer position without forcing the others to unnecessarily redo their training. First, the new officer or advisor must complete the online training on the Clubs and Organizations website (as described in the Online Training section earlier in this chapter). Once the training is complete, the RSO must contact ASI Club Services to request a Replace Charter form and provide the name(s) and position(s) of the new officer(s)/advisor(s). Once ASI Club Services is notified, a Replace Charter form will be routed for signature, including that of College Dean if the club is affiliated with their college. The revised Charter will be submitted to ASI Club Services for processing. Once the chartering process is completed, the president will be notified by ASI Club Services by email.

Note: New officer(s)/advisor(s) will not be able to sign any paperwork until the Charter has been approved by the Clubs and Organizations Office. No requests (e.g., Club Payment Request Forms, ASI Club Funding Applications, E-Plans) can be processed until the Charter has been approved. Officers on the previous Charter may sign paperwork until either the previous Charter expires or until the new Charter is approved.

Removing an Officer(s)/Advisor(s) from an Existing Charter

When a RSO wishes to remove, and not replace, officer(s)/advisor(s) from a Charter, the RSO can begin the Replace Charter process as outlined above.

Note: As all RSOs must have a president, treasurer, and advisor, the Replace Charter process cannot be used to remove those positions. RSOs must maintain a minimum of two officers (president and treasurer) and one advisor on the Charter at all times.

**ADVISORS**

**RSO Responsibilities to Their Advisor(s)**

It is each RSO’s responsibility to utilize their advisor(s) and maintain open communication. These responsibilities provide a foundation for RSOs to work effectively with advisor(s).
RSO Responsibilities

• When planning meetings for the year, the group should make an effort to designate times that are convenient for the advisor(s) to attend the meetings.
• Minutes of meetings, as well as other club materials, should be distributed to advisor(s). This keeps advisor(s) informed and allows them to keep historical files of useful information.
• If executive meetings are established to determine agendas or to discuss issues, the advisor(s) should be invited. If the advisor(s) are unable to attend, they should be informed about what was discussed at the meeting.
• RSO officers should maintain a close relationship with the advisor(s) and should provide opportunities to meet as many members as possible.
• RSOs should invite advisor(s) to all events. It is important to not only inform advisor(s) about what is happening but also allow advisor(s) to provide input about the proposed event or activity.
• If situations arise that may cause problems for the RSOs or its members, advisor(s) should be informed immediately.
• RSOs should regularly update advisor(s) concerning the financial status of the organization.
• Although advisors do not expect special recognition, they like to know their time is appreciated.

Advisor Responsibilities to the RSO
All RSOs recognized for the academic year must have an advisor who is a University employee (i.e., Cal Poly State University employee). The advisor’s employment with the state will be verified by the Clubs and Organizations Office as part of the chartering process. All advisors should understand that by agreeing to serve as an advisor, they are assuming certain responsibilities. An effective advisor has a strong belief in the RSO, a desire to help students succeed, a willingness to share expertise, and a commitment to spend time with the RSO’s officers and members.

Advisor Responsibilities

• Be a University representative to the RSO.
• Learn about pertinent University policies and procedures. Advise RSO officers on adhering to these policies, including those regarding alcohol, contracts, and purchasing.
• Provide continuity from year-to-year during transitional periods.
• Help mediate within the RSO and assist with problems that may arise.
• Act as a role model. Encourage leadership and group development.
• Assist in developing the RSO’s short and long-term goals and provide guidance to help the RSO reach those goals.
• Be aware of all RSO activities, be involved with all RSO events, and provide insight and guidance for activity 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 expenditures, support budget planning, and monitor financial records.
• Carefully review and authorize all RSO PRFs and accompanying original/itemized receipts and invoices. PRFs must have the advisor’s signature in order to be processed.
• Remind RSO officers to request Purchase Orders prior to confirming orders with vendors whenever possible.
• Review all distributed material, publicity, and official correspondence before distribution.
• Review and approve Cash Securities forms, Gift-in-Kind forms, ASI Club Funding applications, and PayPal Button Request forms. Other documents do not require the advisor’s approval/signature but should be reviewed.
• Report disclosed crime information. The Clery Act is a federal law that mandates crime statistic disclosure, the 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.

- Advisors have a mandated reporting responsibility as a Campus Security Authority (CSA). If a student reports or discloses a crime to their advisor, the advisor is expected to submit a report with the University Police Department that containing information about the crime. The student’s name and personally identifiable information are not a part of the report. The following are 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 her house being broken into and her laptop being stolen.
  - If the advisor becomes aware of a missing or potentially missing person, the advisor must report the incident to the University Police Department immediately. The on-duty Police Dispatcher can be contacted at (805) 756-2281. In the case of an emergency, dial 9-1-1. Students can also make anonymous reports of crimes by text (text from a cellphone to calpoly@tipnow.org and your cell service will send the message as a text and without a name or phone number attached to it) or Email TipNow: tipnow@calpoly.edu. Visit the TipNow page for more information. For questions regarding the Clery Act or the reporting of crimes at Cal Poly, please contact the Police Records Manager at (805) 756-6685.
  - Receive all RSO mail at the end of the academic year that has not been picked up by club officers.

Advisor Indemnification

As employees, faculty/staff advisors are indemnified by the California State University. Each employee is protected under the university insurance program while acting in the course and scope of employment. Cal Poly will protect and defend employees that are named in civil action that results from their role as a Club Advisor when they are acting in the course and scope of this part of their job.

Co-Advisors

Although not required, RSOs are encouraged to designate a co-advisor on their Charter who will have signing authority if the primary advisor is unavailable. Co-advisors must also be Cal Poly State University employees. Failure to obtain a co-advisor could result in processing delays if the primary advisor is unavailable for signature.

Words of Wisdom for Advisors

- 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 mistakes, this is not the role of an advisor.
- An advisor does not supervise or control RSO activities. The advisor’s role is strictly advisory. An advisor should help members benefit from their experience by using mistakes and opportunities as teachable moments. The advisor should be proactive when a potentially controversial or policy-related situation or decision is discussed while allowing the RSO member to make their own decisions and choices.
- Part of the educational experience students gain in leadership positions 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 PRFs. The advisor’s signature (in addition to a student officer’s signature) signifies that club money is being spent appropriately. The advisor provides an extra security level to protect the integrity of RSO and ASI funds.

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47 TipNow [https://afd.calpoly.edu/police/docs/tipnow.pdf](https://afd.calpoly.edu/police/docs/tipnow.pdf)
RSO Accounts

RSO Funds shall be held in trust by the campus through ASI unless granted a specific exception by the University Controller. ASI works with Chase Bank to maintain club accounts. University policy requires that clubs deposit all funds with ASI. The purpose of this policy is to ensure the integrity of the funds from year to year. Financial statements, donations, and all check and purchase order requests are processed by ASI Club Services.

Clubs which have not been granted an exception are not permitted to have off-campus bank accounts. Clubs found to have off-campus bank accounts are subject to disciplinary action. Requests for checks or transfers to any club account held off-campus will not be processed.

Depositing Funds into a Club Account

To deposit non-donation money into a club account, an officer listed on the current Charter must go directly to the Chase Bank branch located at 1235 Chorro St. General members cannot deposit on behalf of the club. The Chorro Chase Bank branch is the only location that accepts club deposits.

Deposits may also be made on-campus at the ASI Business Services Window located at the front of the Cal Poly Recreation Center. For more information, please visit the ASI Club Services webpage.

Refer to the “Gift and Donation Processing” section for appropriate donation processing procedures.

Separation of Duties

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 must be maintained when cash is received and processed. Separation of Duties requires that two or more qualified and authorized persons are involved in the process of collecting, handling, depositing, and accounting for all cash/check transactions. The person collecting money, issuing receipts, and preparing the deposit should be someone other than the person verifying the deposit.

Preparing Deposits

At the time of this writing, RSO deposit processes are impacted by safety protocols that have necessitated the closure of the second floor of the University Union, which houses ASI Club Services. Additionally, Chase Bank officials have decided to close the Chase Bank location on Cal Poly campus.

- Accountability for and documentation of cash and checks must be maintained when preparing club deposits. 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 the club’s records.
- Deposits should be made the same day as collected if possible or as soon as possible if not (i.e., the next business day).
- RSO deposits can be made in person at two locations:
  1. The Chase Bank branch located at 1235 Chorro St in downtown San Luis Obispo
  2. On the Cal Poly campus at ASI Business Services located at the Ticket Office in the front of the Cal Poly Recreation Center.
- Deposits can also be mailed to ASI Club Services to deposit on your clubs’ behalf. Mail to:
  ASI Club Services
  1 Grand Avenue, San Luis Obispo, CA 93407
- Deposit slips are available on the ASI Club Services virtual services webpage. Fill out the deposit slip completely, print a copy and attach to the deposit (cash or check).
- It will take 5 – 7 business days for any RSO deposits to show up on the RSO’s transaction report.

RSO HANDBOOK Updated November 6, 2020
• There are two types of deposit slips: Fundraising and General Club Deposit. The fundraising deposit slip allows you to add a description (up to 20 characters) that will appear on a transaction report that officers can request from ASI Club Services. The general deposit slip provides checkboxes for you to select from that best describe your deposit type.
• Amounts should be filled in by denomination and the club’s name and account number.
• For cash, place like bills together (i.e., all $1 bills together, all $5 bills together, etc.) and roll coins in coin wrappers if appropriate.
• For checks, make copies of all checks for the club’s records. Sort checks by dollar amount.
• Note: All checks should be made payable to ASI-Cal Poly Clubs as the payee with the club name in the memo line or attached check stub/documentation. If the check has been made out to the club, the club officer must endorse the check over to ASI-Cal Poly Clubs prior to making the deposit.
• Endorsement should be: Club Name- For deposit only to ASI (written above the endorsement stamp).
• Stamp all checks prior to making a deposit. The appropriate endorsement stamp is available at the Chorro St Chase Bank branch and at the ASI Business Services Window.
• Checks made payable to Cal Poly State University, or any department will require an endorsement from the University. In this case, please contact ASI Club Services for assistance.
• Donations cannot be deposited at CHASE Bank. Deposit donations at the ASI Business Services located at the Ticket Office in the front of the Cal Poly Recreation Center.

Depositors are required to stay with the teller during the entire deposit process. Physical Security

All cash and checks should be physically protected from loss at all times by locking them in a secure receptacle. If the RSO will be depositing large sums of money (e.g., over $2,000), it is highly recommended that two officers accompany the deposit for security reasons. University Police are available to escort an officer making a deposit as well.

Depositing Checks

All checks for deposit must have:
• ASI-Cal Poly Clubs as the payee with the club name in the memo line. If the check has been made out to the club, the club officer must endorse the check over to ASI-Cal Poly Clubs prior to making the deposit (See ASI Club Services if you need assistance).
• Not be altered.
• A date within the last six months (review check for expiration date as some can be as short as 90 days).
• A legible and consistent amount, both numeric and written.
• A proper account holder signature (authorized signer).
• Printed (not handwritten) name, address, and check numbers.
• Two or fewer corrections, initialed by the signer.

Returned Checks

If a deposited check is returned from the bank due to insufficient funds (i.e., “bounced check”), stop payment, stale check, or any other reason, the ASI Business Office sends a collection letter by e-mail to the individual who wrote the returned check. The letter states that the amount of the check, plus a collection fee of $5 in addition to 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 a 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 RSO 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 Bank 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, for a total of $30.00 per returned check. The amount of the check and associated fees will be deducted from the club’s account. The funds will be credited back to the RSO account only when/if payment (including bank and collection fees) is received on the returned check.

Availability of Funds

There is a five-to-seven business day delay between the deposit of funds at Chase bank and the posting of the deposit to the RSO account. If immediate access to deposited funds is needed, contact ASI Club Services for available options.

Credit Card Transactions (Non-Donation Related)

Deposits cannot be made by providing credit card information to ASI Club Services or Chase Bank for processing.

RSOs interested in accepting credit card payments for non-donation transactions will be required to utilize PayPal. To receive a PayPal button next to your club name on the online Club Directory, please complete the PayPal Button Request form found on the Forms and Resources page of the Cal Poly website. All requests to receive a PayPal button must be submitted 14 days in advance to allow for processing.

PayPal Buttons can be created for:

- RSP Dues
- Event Registration
- Membership Fees

PayPal cannot be used to sell merchandise.

PayPal cannot be used to collect donations.

All requests to receive a PayPal button must be submitted 14 days before the date they are needed to allow for processing.

Note: PayPal imposes a fee for this service (currently $.30 and 2.9% per transaction), and this fee will be passed on to the RSO.

PayPal Buttons

PayPal buttons are created from the ASI – Cal Poly account for exclusive use on the ASI – Cal Poly website on behalf of the approved organization. Copying or republishing PayPal button code for use elsewhere is not permitted.

Other Electronic Financial Applications

Venmo or other electronic financial transfer applications are not permissible methods of collecting funds.

Obtaining Funds from a State Department or Entity

ASI will provide invoicing services to RSOs in order to obtain funds from an on-campus state department or entity. The university requires RSOs to submit supporting paperwork documenting actual expenses for events, with an ASI invoice.

To request an invoice, submit back-up documentation to ASI Club Services (e.g., email authorization, Purchase Order received by the RSO, event registration forms). As soon as the ASI invoice is created (approximately seven
business days), the reimbursement amount will appear on the RSOs transaction report. However, this does not mean that the invoice has been paid. To confirm that the invoice has been paid, contact ASI Club Services.

Note: Product sales and services cannot be invoiced due to labor laws and sales tax regulations.

**Withdrawing Funds from an Account – Club Payment Request Form (PRF)**

RSOs may use RSO funds to pay invoices and reimburse members by filling out a Club PRF. A Club PRF is a form to request that funds be paid to a person, business, or other RSO (in the form of a check or transfer) or reserved in the RSO’s account (through a Purchase Order) to ensure payment to a vendor or service provider at a later date, once the item/service has been received. This form requires both an advisor and officer signature, which is verified from the current Charter. The officer signature must be different than the payee. If the Club PRF is submitted with all required information, signatures, and supporting documentation, the payment will be processed within five to seven business days.

**CLUB PAYMENT REQUEST FORM (PRF) GUIDELINES**

- Club Payment Request Forms (PRFs) will be processed via Adobe Sign. To initiate the PRF process, complete the Club Payment Request Form (AdobeSign) found on the Forms and Resources page of the Clubs & Organizations website. Once all required fields are completed, a blank PRF will be sent to the form requester for completion. Upon submission, the PRF will be routed to the designated club officer and advisor through Adobe Sign for approval/signature.
- ASI Club Services cannot honor payment requests for expenses that do not align with guidelines and protocols from governing authorities and the university (i.e. in-person events or club travel). However, reimbursements will be honored for club activities that adhere to current university policies and protocols (i.e. virtual meetings, events, or activities).
- The purchase of prepaid credit cards or gift cards for vendors who sell alcohol (e.g., grocery stores, restaurants, Amazon) cannot be reimbursed. Since items bought with a prepaid credit card or gift card cannot be tracked, there is no way to ensure alcohol was not purchased.
- Payment Request Forms cannot be used to request petty cash. Petty cash is not available to clubs.
- Club members cannot sign Club PRFs to reimburse themselves. Another officer with financial authorization must sign the Club PRF for checks and balances purposes.
- The following information must be included on all Club PRF’s:
  - Payee name.
  - Payment type: direct deposit/check, purchase order, or transfer (to other clubs only).
  - Payee mailing address (regardless of whether the payment is processed via check or direct deposit).
  - Payee phone number.
  - Payee Cal Poly email address (if applicable).
- The payee listed on the back-up documentation must match the name of the payee on the Club PRF. Reimbursements can only be made to the person that paid for the expenses. If the payee listed on the Club PRF and the name on the receipts do not match, the payee must provide proof of payment in their name, such as a credit card statement. In the event of cash payment, an original receipt is required. In some cases an Advisor Memo may need to be included to explain the circumstances of the payment. Please review the Advisor Memo for more information. This Advisor Memo does not guarantee approval of the Club PRF.
- Reimbursements for prepayment items cannot be processed before the product/service has been received, unless otherwise stated in an officially approved contract. If prepayment is required, RSOs must follow the Purchase Order guidelines.
- RSOs will be required to include the payee’s Cal Poly email address (if applicable) on all Club PRFs. If an email address is not provided, and cannot be confirmed by ASI Club Services, the Club PRF will be

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40 Ibid
returned. If the payee is not affiliated with the university, RSOs must write “n/a” in the space provided for the Cal Poly email address.

- Please note that if your club has received ASI Club Co-Sponsorship or College Club Council funding any payments processed through a PRF will utilize those funds until they are fully allocated.
- The Club PRF includes an additional question pertaining to the use of the use of Cal Poly’s marks. This checkbox informs ASI Club Services whether any merchandise being reimbursed or paid for uses the Cal Poly name, logos, marks, and/or symbols. If you select “yes,” the approved Trademark Licensing Request Form\(^5\) must be attached to the Club PRF in order to be processed. If you select “no,” this indicates that the organization has not used the Cal Poly name, logos, marks, and/or symbols on the items being paid/reimbursed for. If this checkbox is left blank and the back-up documentation shows that merchandise using the Cal Poly name, logo or any marks has been purchased, the Club PRF will not be processed and will be returned.

Note: Failure to use a properly licensed vendor or failure to get approval when purchasing merchandise using Cal Poly marks may lead to suspended privileges, the vendor not being paid, and/or not receiving reimbursement.

**PAYMENT REQUEST FORM BACK-UP DOCUMENTATION**

Every Club PRF submitted to ASI Club Services must have proper supporting documentation. Back-up documentation is required for auditing purposes and serves to protect the organization’s funds. The most common form of documentation is an original itemized sales receipt from a vendor. All members should save original receipts from transactions. Submission of a Club PRF without complete back-up documentation will result in a delay of payment. Any receipts submitted without proof of payment will not be reimbursed. All relevant back up documentation must be uploaded through the file attachment field on the PRF request form.

- Original itemized company receipt or invoice
  - lists the items purchased
  - shows that payment was made via cash, check, or credit card
  - provides company name and contact information
- Original handwritten receipt or invoice
  - lists the items purchased
  - shows that payment was made via cash, check, or credit card
  - company name and contact information must be imprinted on the receipt
- Online orders
  - lists the items purchased
  - attach a copy of the final receipt/confirmation with the payee’s name
  - documentation must state that a payment was made via cash, check, or credit card and/or show a balance of $0.00 due

Lost receipts require an Advisor Memo along with proof of payment, such as a bank statement. Lost receipts for cash purchases will not be reimbursed, even with an Advisor Memo.

Note: All receipts must be legible to be processed.

**PAYMENT REQUEST FORM FOR REIMBURSEMENT**

Every PRF submitted to ASI Club Services must have proper supporting documentation attached:

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\(^5\) Trademark Licensing Request Form [https://universitymarketing.calpoly.edu/trademark-licensing/request-form/](https://universitymarketing.calpoly.edu/trademark-licensing/request-form/)
• Original itemized company receipt/invoice:
  o Lists the items purchased.
  o Receipt/invoice must show that payment was made via cash, check, or credit card.
  o Receipt/invoice must provide the company name and contact information.

• Original handwritten receipt/invoice:
  o Must have company name and contact information imprinted on the receipt.
  o Lists the items purchased.
  o Receipt/invoice must show that payment was made via cash, check, or credit card.

• Online orders:
  o Print copy of acknowledgment of order (should be the final receipt) with the payee name and listing items and costs.
  o Documentation must state that payment was made via cash, check, credit card and/or show the total amount paid or show a zero balance due.

• All receipts must be legible in order to be processed. If a receipt is not legible, an individual in the organization will be required to contact the vendor/service provider to request a reprint of the receipt and attach it to the Club PRF along with the original illegible receipt.

PAYMENT REQUEST FORM FOR INVOICES

When paying a company directly based on an invoice, the following documentation must be submitted with your Club PRF:

• Original invoice from the company detailing:
  o Company name and contact information
  o Invoice date
  o Item(s) and/or service(s) purchased
  o Amount owed

• IRS Form W-9: A vendor’s W-9 must be on file with ASI Club Services in order to issue payment. Contact ASI Club Services to see if a W-9 is needed from your vendor or if one is already on file.

Note: Supporting documentation must state that it is an invoice (i.e., it cannot state that it is an estimate, quote, statement, etc.). If the documentation states that it is an estimate or quote, ASI Club Services will only issue a Purchase Order.

INVOICES FROM ON-CAMPUS VENDORS

Once ASI Club Services receives an invoice from the campus vendor/service provider, we will email the RSO informing them of the amount of the charge. If the RSO does not contact ASI Club Services to dispute the amount within five business days, the invoice will be paid, and the amount will be removed from their account.

INVOICES FROM OFF-CAMPUS VENDORS

If ASI Club Services receives an invoice in the mail from an off-campus vendor and the RSO does not have a Purchase Order on file, the invoice will be emailed to the club treasurer to prepare a PRF for submission. PAYMENT REQUEST FORM FOR CONTRACTS

When paying based on a contract, the following documentation must be submitted with your Club PRF:

• An approved contract detailing:
  o Payee contact information
  o Item(s) and/or service(s) being purchased
  o Payment terms as specified in the contract
  o Amount due as specified in the contract

• IRS Form W-9 (A vendor’s W-9 must be on file with ASI Club Services in order to issue payment. Contact ASI Club Services to see if a W-9 is needed from your vendor or if one is already on file.)
PAYMENT REQUEST FORM FOR SCHOLARSHIPS

When paying a Cal Poly student a scholarship, the Club PRF must be completed to include:

• Make the Club PRF payable to CPSU Financial Aid
• The Recipient’s Employee ID # (EMPLID)
• The Recipient’s Cal Poly email address
• For Payee Street Address, list Administration Bldg. 131 E

Back-up documentation for a scholarship must include:

• RSO name that is providing the scholarship
• Recipient’s name
• Recipient’s Employee ID #
• Scholarship amount
• A memo from the RSO advisor stating the reason for the scholarship and how the recipient was selected as well as supporting documentation if available

Note: Whatever is stated on the Advisor Memo must also have appropriate supporting documentation (e.g., if the scholarship is for an essay contest, the RSO must provide a copy of the contest rules).

Submit the completed Club PRF to ASI Club Services. ASI Club Services will check the Club PRF for completeness and correct signatures. If complete, the Club PRF will be processed and a check will be sent to the Cal Poly Financial Aid Office. Financial Aid will either directly deposit the scholarship into the recipient’s account, or a check will be mailed to the current mailing address on the recipient’s Cal Poly Portal. It takes approximately two to four weeks to process and distribute a scholarship.

Note: When paying a non-Cal Poly student a scholarship, please see ASI Club services as this process is different.

PAYMENT REQUEST FORMS FOR AWARDS

If the RSO will be distributing money as an award (e.g., cash prize), follow these directions:

• Complete the Club PRF, making it payable to (Payee Name) the recipient receiving the award.
• Submit the following back-up documentation:
  o A completed IRS Form W-9 for the award recipient
  o An Advisor Memo from the RSO advisor explaining the award
  o Supporting documentation for the memo (i.e., anything listed in the memo must have supporting documentation)

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.

PAYMENT REQUEST FORM FOR DONATING FUNDS

RSO funds can be donated to nonprofit organizations of the clubs choosing. To do so, complete a Club PRF. Under “Payee Name” put the nonprofit organization’s name, mailing address, contact phone number. Under “Description,” write “Donation”. Required back-up documentation is an Advisor Memo explaining why a donation is being made and a W9 for the non-profit organization.

Note: Donations to nonprofit organizations must be paid directly out of the club’s account. Donations made by an individual cannot be reimbursed.

PAYMENT REQUEST FORM FOR PURCHASE ORDERS

A Purchase Order 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. When a club submits a Purchase Order, this encumbers (or sets aside) the amount requested in the club’s account until the final invoice and payment authorization is received.
By having a Purchase Order on file, it will ensure the club has sufficient funds in the club account to cover the expenses being requested. Most campus entities will require a Purchase Order from a club prior to providing any goods or services (unless the club has decided to pay out of pocket and be reimbursed after).

To request a Purchase Order, check the “Issue Purchase Order” box at the top of the Club PRF. Fill out the name, address, phone number, and fax number of the vendor along with the necessary information. Required back-up documentation for a Purchase Order includes an IRS Form W-9 for the vendor and a detailed estimate or quote of the purchase, including the anticipated total with expected shipping charges.

Note: ASI Club Services has frequently used vendor IRS Form W-9’s on file. However, if we do not have it, it is the club’s responsibility to obtain one from the vendor. Please inquire with ASI Club Services to verify if there is a W9 for your vendor on file.

Purchase Orders are processed within five to seven business days and will be emailed to the vendor.

Upon receiving the final invoice from the vendor, ASI Club Services will contact the club to ensure that the items or services were received and that the amount (if over the original Purchase Order amount) is approved to pay. If the vendor sends the club the final invoice, it is the club’s responsibility to submit the invoice to ASI Club Services to request payment. CLUB PAYMENT REQUEST FORM FOR TRANSFERS

Funds can be transferred from one club’s account to another by completing a Club PRF. Under “Payee Name,” put the club’s name and account number to which funds are being transferred. In this situation, it is not necessary to fill out the “Payee Street Address” section. Insert the paying club’s information under “Club Name” and “Account Number.” Under “Description,” write “Transfer” and include an explanation of why the transfer is necessary.

Back-up documentation for a transfer must include:

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

Note: A transfer can only be done between clubs. Whatever is stated in the advisor memo must be proved with additional supporting documentation.

Charging Privileges

ON-CAMPUS VENDORS

While most on-campus vendors require a Purchase Order, there are some vendors that will automatically charge the club account, even if a Purchase Order was never initiated by the club. In this case, the president, treasurer, and advisor will receive a notification email from ASI Club Services with the charge amount and a brief description of the charge.

It is the club’s responsibility to respond to ASI Club Services if you do not approve payment. If a response is not received within five business days of notification, the bill will automatically be paid, and the funds will be removed from the club’s account. The following on-campus vendors have the authority to do a chargeback after the product or service has been received:

- CPSU Facility Services (i.e. rental of trash cans, recycle cans, tables, chairs, etc.)
- All State Accounts (i.e. Department accounts, UPD, parking, insurance, copier charges, etc.)

Note: At times, the charge description that ASI Club Services is provided is vague. It is in the best interest of the club to keep records of any expenses incurred with on-campus vendors.
ASI

If the club is reserving space or renting equipment from ASI, you will be made aware of the estimated expenses of your request (AV, set-up, equipment rental, etc.). Prior to the event, you will provide the ASI department you are working with the club’s account number.

After the event, ASI Club Services will send a notification email to the president and advisor with the charge amount and a description of the charge. It is your responsibility to respond to ASI Club Services if you do not approve payment of these charges. If a response is not received within five business days of notification, the bill will automatically be paid, and the funds will be removed from the club’s account. The following ASI departments will charge back after the product or service has been received.

- ASI Audio Visual
- ASI Event Operations
- ASI Recreational Sports/Sports Complex
- Poly Escapes

Sales Tax

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 as the case with out-of-state orders, 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 by request through ASI Club Services.

Another sales tax issue occurs when a club member pays out-of-pocket for club expenses and personal items on the same receipt. Be sure to include 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 will adjust the sales tax if necessary. To simplify the payment process, members should be encouraged to keep club and personal purchases separate.

TAX RATES

As of July 2020, the following tax rates were in effect:

For items delivered to Cal Poly, the tax rate is 7.25%. (Cal Poly is not considered to be in the city limits of San Luis Obispo.)

For items picked up within the city of San Luis Obispo, the tax rate is 7.75%.

The tax rates for other cities and/or counties may vary. Please check receipts for the appropriate reimbursable tax rate. The sales and use tax rates by city and county can also be found on the California State Board of Equalization51.

Avoiding Delays

PROCESSING DELAYS

Incomplete paperwork submitted for processing may cause processing delays. ASI Club Services attempts to minimize these situations by reviewing documents when received. However, if incomplete paperwork is

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51 California State Board of Equalization [http://www.boe.ca.gov](http://www.boe.ca.gov)
submitted that will cause a processing delay, the submitting club officer and/or advisor will be contacted via email, and the incomplete paperwork will be canceled. Once any issues are resolved, the paperwork can be resubmitted for processing.

**DELIQUENT ACCOUNTS**

Clubs maintain account privileges by having a positive account balance. On the 1st and 15th of every month, ASI Club Services runs a report indicating all delinquent club accounts. ASI Club Services then notifies the club president, treasurer, and advisor via email of their delinquent account status and instructs them to deposit club funds to make their account current. Please note – if a club has a delinquent balance, departments on campus where clubs are permitted to charge for products or services (e.g., audio visual, vehicle rentals, catering, etc.) will likely not permit clubs to charge to their accounts.

If the club account balance is delinquent, new paperwork (e.g., Club PRFs, E-Plans) may not be processed until the club account has a positive account balance. To do so, a deposit covering at least the negative balance amount must be made. Once the deposit has been made, a copy of the deposit slip must be hand-delivered by a club officer to ASI Club Services for verification, and to release the temporary inactivation of the club account. A delinquent account could result in judicial proceedings against the club.

**Financial Statements**

ASI Club Services provides transaction reports upon request.

**Gift and Donation Processing**

**RECEIVING CREDIT CARD DONATIONS**

All donations being made via credit card must be processed through the Cal Poly “Giving” website.

Follow these directions to use the website:

- Access the Cal Poly Giving website\(^{52}\)
- Click on “Give Now”
- Enter your donation amount.
- Under Designations, click on “Select College and Program(s) from Pop-Up Menu.” Select “Other – Write Fund Name Below” and click Continue.
- Type the RSO’s name in “Enter fund not listed or choose from menu.”
- Complete the “Information About You” section.
- Click on the “Save and Continue” button to continue with the transaction.
- Once completed, the donation will be processed and deposited into the club’s account.

Note: All donations made via the Cal Poly “Giving” site will incur a 15% processing fee from University Development. The processing fee will not be deducted from the initial donation, but will be accrued by Cal Poly Foundation on a monthly basis. ASI Club Services verifies the donation made against the processing fee prior to paying the Cal Poly Foundation invoice.

**RECEIVING CASH OR CHECK DONATIONS**

For donations by cash or check, complete a Cash/Securities Gift Information form, available on the Forms and Resources page\(^{53}\). 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 the club advisor print their name in the “Gift Received By” and sign the “Approved By” section. Submit donation and appropriate Cash/Securities Gift Information form(s) to the ASI Business Services Window. The donation will be processed, and a deposit will be made to the club account.

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\(^{52}\) Cal Poly Giving [https://giving.calpoly.edu/](https://giving.calpoly.edu/)

\(^{53}\) Clubs Forms and Resources [https://clubs.calpoly.edu/forms-and-resources](https://clubs.calpoly.edu/forms-and-resources)
Note: ASI Club Services does not charge a processing fee for donations made by cash or check.

STUDENT SOLICITATION FOR DONOR SUPPORT

To better develop and maintain positive relationships with donors, it is vitally important that the campus’ cultivation, solicitation and stewardship of donors be done consistently, appropriately, and collaboratively. The University Development team considers donor relationships with a long-term view.

- Students Affairs fundraising staff will work with RSOs to solicit funding if the request is $2,500 or more.
- Students Affairs fundraising staff will work with students and clubs to ensure their “asks” are within university guidelines and will include students in the solicitation process as appropriate and possible.

You may also contact your College Development Office for guidance. Visit the contact page for Cal Poly Giving: giving.calpoly.edu/contact-us. Scroll down to the section titled “College & Unit Teams” to see the development officers that are relevant to your area. If your club is not affiliated with a specific college, contact ASI Club Services for guidance.

Receiving Donations of Supplies or Goods (Gift-In-Kind Acceptance Form)

For donations of supplies or other goods, complete a Gift-in-Kind Acceptance form available from Cal Poly Advancement Network54. Attach all documentation supporting the acceptance of the gift and the value of the donation (i.e., as provided by the donor). Be sure to complete all required fields and have the club advisor print their name in the “Gift Received By” section and sign their name in the “Approved By” section. Turn in all completed forms to ASI Club Services.

GIFTS-IN-KIND WITH A VALUE GREATER THAN $5,000

All gifts-in-kind with a value greater than $5,000 are to be reported immediately upon receipt with a Gift-in-Kind Acceptance form available from Cal Poly Advancement Network55. All gifts-in-kind from individuals with a value more than $5,000 and all gifts that require special expertise to establish the value, (e.g., works of art, horses) must include an appraisal executed by a qualified independent appraiser. The appraisal cannot be made more 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. In most cases, gifts-in-kind that are produced or manufactured by a corporation or other business making the contribution 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 item(s). Gifts of equipment and software should be booked at the educational discount value (i.e., the value the university would have paid had the equipment or software been purchased from the vendor).

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.

54 Cal Poly Advancement Network https://advancement.calpoly.edu/content/forms/index
55 Ibid
• The date(s) on which the property was appraised.
• 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.

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 with a Gift-in-Kind Acceptance form available from Cal Poly Advancement Network. 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 such documentation from the donor will be recorded on the university’s gift record system with a nominal value ($1).

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 Development. 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 as well as IRS regulations, the following types of gifts-in-kind contributions are not considered charitable contributions and will not be included in the university’s annual fundraising totals:

• Use of real property
• Discounts on purchases
• Costs of appraisal
• Shipping costs
• Sales tax
• Permanent loans (i.e., property given to Cal Poly as a permanent loan will not be booked as a gift)

GIFT RECIPIENT

The advisor must be listed as the recipient of the gift-in-kind on the Gift-in-Kind 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 students on campus and for gifts-in-kind that will directly benefit the university. The Cal Poly Corporation is the donee for gifts of equipment that will be used for enterprise ventures on 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.

GIFT-IN-KIND ACKNOWLEDGEMENTS

Gift acknowledgment 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 Development that includes the description of the gift and the gift designation.

56 Ibid
DONATION ACKNOWLEDGEMENTS

When your club receives a donation and the proper process has been followed (e.g., via the Cal Poly Giving website, Cash/Securities Gift Information Form, Gift-in-Kind Acceptance Form), the University will mail the donor an official tax receipt letter for their records.

In addition to University Development and University President acknowledgements, club officers are expected to write their own acknowledgement letters to thank all donors. All thank you letters should be mailed to the donor within one week.

DONATING CLUB FUNDS

- Club funds may be used to donate to nonprofit organizations. A request to donate funds must be submitted via a Club PRF. An explanation of the donation (printed email, memo, etc.) from the club advisor and a completed W-9 form for the organization being donated to must be attached to the Club PRF to be processed. The request will be reviewed by the Clubs and Organizations Office. If approved, the donation will be processed.

Note: No individual should charge a donation on their personal debit or credit card. Reimbursement requests for these expenses may not be approved.

Direct Deposits for Individuals

In an effort to ensure reimbursements can be processed in a timely manner, we strongly encourage all club officers and advisors to complete a Direct Deposit Application. Once completed, please sign as the ‘authorized enrollee. A signature is required for this form to be considered a legal document. Forms submitted without a signature cannot be processed.

With the application, please include one of the following:

- A photo or scan of a check with ‘VOID’ written across the check, or
- A copy of your bank’s direct deposit info showing the routing and checking or savings account number (found within your online banking page).
- Please email the completed application and back-up documentation to asiclubservices@calpoly.edu

Once set up, an email will be sent on the day the reimbursement is processed notifying that funds were sent to the indicated bank.

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. RSOs which are granted an exception by the University to bank off campus, student-run organizations that receive other funds supported through mandatory student fees, and Instructionally Related Activities (IRAs) are not eligible for ASI Club Funding. College Club Councils are not eligible for ASI Club Sponsorship but can apply for ASI Event Co-Sponsorship (see below for more information).

TERMS OF FUNDING

Clubs may apply for both ASI Club Sponsorship and ASI Event Co-Sponsorship funding with a maximum combined allotment of $1,650 per club per fiscal year (i.e., July – June). For example, if your organization requests $450 through ASI Club Sponsorship, your club is still eligible to apply for up to $1,200 in ASI Club Event Co-Sponsorship for a maximum allotment of $1,650.
All ASI Club Funding must be reconciled by Friday of week 9, spring quarter. After that date, any remaining ASI Club Funding will be removed from the club’s account.

**ASI CLUB SPONSORSHIP ($450)**

ASI Club Sponsorship is available at a maximum of $450 per fiscal year. ASI Club Sponsorship is intended to support clubs with their general expenses. ASI Club Funding is not distributed automatically; clubs must apply for ASI Club Funding each fiscal year. Applications will be reviewed in the order received and will be approved until allocated funding is depleted.

**ASI CLUB EVENT CO-SPONSORSHIP (UP TO $1,650)**

ASI Club Event Co-Sponsorship is available at a maximum of $1,650 per fiscal year. ASI can provide funding up to 50% of the costs associated with hosting an event (not to exceed $1,650 for a single event). ASI sponsored funds cannot be used to fund the remaining 50%. For example, an RSO may not combine ASI Club Event Co-Sponsorship funding with ASI Social Justice Program Funding. The $1,650 may be applied to one single event or multiple events. An application must be submitted for each event and the total awarded across all events may not exceed $1,650.

An ASI Club Event Co-Sponsorship application must be submitted to ASI Club Services no later than 14 days prior to the event. An E-Plan must be on file prior to submission of an ASI Club Event Co-Sponsorship application.

**ASI CLUB SPORTS FUNDING (UP TO $6,000)**

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

To receive funding, the Club Sports Council must submit an ASI Club Sport Funding Allocation Request, containing the specific funding amount being requested and the tentative allocation amounts for each club sport and/or Club Sports Council’s administrative expenses. The allocation request must be submitted to the ASI Chair of the Board by the third week of winter quarter. The Club Sports Council must then submit a Club Sports Funding Allocation Report, containing specific funding amounts for each sport club recognized within the Club Sports Council to the Chair of the ASI Board of Directors by the last Board meeting of the academic year.

**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 Club Event Co-Sponsorship. College Councils are eligible to receive ASI College Council Funding with a maximum allotment of $424.00 + $0.16 per student in the college per fiscal year.

**COLLEGE CLUB COUNCIL EVENT CO-SPONSORSHIP (UP TO $1,150)**

ASI College Club Council Event Co-Sponsorship is available at a maximum of $1,150 per fiscal year. ASI can provide funding up to 50% of the costs associated with hosting an event that will enhance their image, promote their college to students within their college, and encourage broad student involvement in college activities (not to exceed $1,150 for a single event). College Club Council funds cannot be used to fund the remaining 50%. The $1,150 may be applied to one single event or multiple events. An application must be submitted for each event and the total awarded across all events may not exceed $1,150.

An ASI College Club Council Event Co-Sponsorship application must be submitted to ASI Club Services no later than 14 days prior to the event. An E-Plan must be on file prior to submission of an ASI College Club Council Event Co-Sponsorship application.
Bank Account Exceptions

Organizations that are affiliated with national or local organizations with non-profit status may request to hold their money in a separate account not maintained by the university but maintained by the non-profit organization.

In order to be considered, organization representatives must submit a Banking Exception Request Form and a completed Form 990 from their affiliated organization with tax-exempt status for each year they wish to bank off campus. Banking exception requests must be submitted with the organization’s Club Charter by the deadline listed on the Clubs Baking Exception Request website.

Any exception will be made at the discretion of the University. Any organization which uses organization funds in a manner which violates CSU executive orders (EO) or Cal Poly Campus Administrative Policies (CAP) or engages in behavior that is not consistent with the RSOCC will be subject to an immediate revocation of this exception.

Organizations which do not use on-campus banking are not eligible to apply for ASI Club Funding.

**CONTACT INFORMATION**

**ASI Club Services**

Phone: 805-756-5807
Email ASI Club Services: asiclubservices@calpoly.edu

**Clubs and Organizations**

Phone: 805-756-5467
Email Clubs & Organizations: clubs@calpoly.edu

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58 Clubs Banking Request [https://clubs.calpoly.edu/money/banking-exception](https://clubs.calpoly.edu/money/banking-exception)