



CAL POLY
Clubs and Organizations

RSO HANDBOOK

A guide to understanding policies and identifying resources for Recognized Student Organizations (RSO).



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INTRODUCTION

Recognized Student Organizations (RSOs) are any student clubs or organizations that have been officially recognized by California Polytechnic State University (Cal Poly).

Recognized Student Organizations provide organized student activities that function as part of the official university community. RSOs may not operate independently of this and any other applicable university regulations, policies, or procedures.

This handbook is designed to assist all RSOs with understanding university policies, identifying resources available through Cal Poly Clubs & Organizations and Associated Students, Inc. (ASI), 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 excerpted or abbreviated form.

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

GOVERNANCE

Recognized Student Organizations at Cal Poly are governed by California State University (CSU) system-wide policies, executive orders, and campus-specific policies.

CSU EXECUTIVE ORDERS

While all Executive Orders apply to RSOs, the most relevant policies are Executive Order 1068: Student Activities and the Interim Systemwide Time, Place and Manner Policy.

CAMPUS ADMINISTRATIVE POLICY

Most campus-based policies are maintained in [Campus Administrative Policies \(CAP\)](#). While all policies in CAP apply to RSOs, the relevant policies for RSOs are [CAP 620 \(Recognized Student Organizations\)](#) and [CAP 140 \(Use of University Property and Time, Place and Manner\)](#).

EXECUTIVE ORDER 1068: STUDENT ACTIVITIES

This executive order ([EO 1068](#)) establishes systemwide policies, procedures, and guidelines for student organizations and activities. EO 1068 grants oversight of student activities to the vice president of student affairs or their designee. Cal Poly Clubs & Organizations is the designee appointed by the vice president for student affairs at Cal Poly for matters related to initial recognition and operations of RSOs. In certain cases involving the re-instatement of an RSO that had operations restricted for judicial reasons, the Office of the Dean of Students will serve as designee for re-instatement of those organizations to ensure that the organization has completed any and all sanctions related to a policy infraction (see [Reinstatement of Recognition](#)).

CAMPUS ADMINISTRATIVE POLICY 620: RECOGNIZED STUDENT ORGANIZATIONS

CAP 620 builds off of EO 1068 to provide campus-specific requirements for RSOs. The Vice President for Student Affairs is responsible for the administration of this policy. Recognized Student Organizations may not operate independently of this and any other applicable University regulations, policies, or procedures.

INTERIM SYSTEMWIDE TIME, PLACE AND MANNER POLICY

[This policy](#) establishes systemwide policies, procedures, and guidelines for the safety and wellbeing of the university community while protecting lawful free expression activities, and it sets forth the consequences for those who violate this policy. The Cal Poly Campus Addendum is incorporated into this policy (see link under “Campus Addenda” section of the policy) and sets forth time, place, and manner regulations and other information specific to Cal Poly. This policy (including the Cal Poly Campus Addendum) applies to students and RSOs to regulate the use of university property to ensure that individuals and groups exercising their legitimate rights do not disrupt the educational process or other

operations of the university, infringe on the rights of others, or engage in unlawful acts. RSOs are required to comply with all university and ASI policies. Failure to adhere to policies may result in revocation of recognition, loss of privileges, or other sanctions for violation of such policies. Procedures for denying or revoking recognition are set forth in applicable provisions of the Code of Student Conduct governing individual and organization misconduct for students.

TYPES OF RECOGNIZED STUDENT ORGANIZATIONS

There are two types of RSOs at Cal Poly: Clubs and Club Councils. This handbook uses the term Recognized Student Organization or RSO when the content equally applies to all types of recognized student organizations.

Clubs

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

Club Councils

Cal Poly recognizes 11 student organizations as Cal Poly Club Councils. These councils are the governing bodies that represent a group of RSOs. Each council exists as an RSO and must also complete the registration requirements annually.

- Panhellenic (PHA)
- Interfraternity Council (IFC)
- United Sorority and Fraternity Council (USFC)
- Club Sports Council
- Esports Council
- College Club Councils

Any social fraternity or sorority seeking recognition will be assigned to one of the Fraternity & Sorority Life councils (IFC, PHA, USFC) by the Vice President of Student Affairs or their designee as part of the recognition process. Consideration may be given to the timely requests and input of the petitioning RSO, their headquarters and governing bodies, the student leadership of the FSL councils, and any other relevant stakeholders, as determined by the RSO Petition Review Committee.

Additionally, the organization must comply with all requirements for being admitted as a council member as outlined in the governing documents of that council and comply with their affiliate's expansion/extension practices (if applicable).

- Panhellenic (PHA): Guidance for admission to the council is described in the [NPC Extension Resource Sheet](#).
- Interfraternity Council (IFC): IFC has two processes for expansion. Guidance is available at [Interfraternity Council Expansion](#).
- United Sorority and Fraternity Council (USFC): Guidance for admission to the council is described in the [USFC Bylaws](#).

An RSO is affiliated with Esports Council or the Club Sports Council if:

- They have complied with all requirements for being admitted as a council member as outlined in the [Esports Council Bylaws](#) or the [Club Sports Council Bylaws](#).
- They are an eligible sport as defined by the CSU Sport Club Guidelines (Club Sports only).
- The RSO has been designated by Cal Poly Clubs & Organizations as being a member organization of the council.

An RSO is affiliated with a college club council if:

- The organization is categorized as academic, honor, and/or professional.
- They have complied with all requirements for being admitted as a council member as

outlined in the governing documents of that council.

- It has gained approval from the dean of that college, designated by the dean's vote of support on the petition.

University Sponsored Organizations

University Sponsored Organizations (USOs) are RSOs that are affiliated with a national scholastic honor society. University Sponsored Organizations invite members based on 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 student may be denied membership or otherwise discriminated against based on protected status, which includes Age, Disability (physical and mental), Gender (or sex, including sex stereotyping), Gender Identity (including transgender), Gender Expression, Genetic Information, Marital Status, Medical Condition, Nationality, Race or Ethnicity (including color, caste, or ancestry), Religion (or religious creed), Sexual Orientation, and Veteran or Military Status.

RECOGNIZED STUDENT ORGANIZATION RECOGNITION

A group of Cal Poly students may petition the university for official recognition as a Recognized Student Organization.

The university may grant, suspend, or rescind official recognition of any student organization for any lawful reason, including failure to comply with this policy.

The university shall establish procedures for the granting, suspension, and rescission of official recognition of RSOs and for any official acts of dissolution.

Benefits of Official Recognition

Recognized Student Organizations, upon being duly recognized by the university and by remaining in good standing, may:

- use the Cal Poly name, marks, and symbols according to the [Merchandise Guidelines](#) under the guidance of University Communications & Marketing officials.
- request to use university facilities under terms and conditions comparable to other non-instructional university programs.
- collect RSO membership dues and gifts.
- utilize monies collected by the RSO solely for lawful RSO activities.
- apply for and receive ASI Club Funding, subject to availability and eligibility requirements.
- schedule events through ASI Facility Scheduling.
- publicize events through Cal Poly Now.
- access Cal Poly Clubs & Organizations and ASI Club Services support and resources.
- participate in campus events as an RSO.
- engage in fundraising activities approved by the university.
- receive tax-exempt charitable donations through provisions administered by the Cal Poly Foundation.

Minimum Requirements for RSOs

Advisor: All RSOs shall support the mission of the university. Each RSO shall have an advisor who will be an employee of the university in good standing. "Good standing" shall mean compliance with the relevant provisions of this policy and any other pertinent laws or policies and not under disciplinary status. Employees of auxiliary organizations are also eligible to serve as RSO advisors. An RSO advisor shall serve in a volunteer capacity without promise, expectation, or receipt of compensation. Any such advisor shall comply with RSO training requirements, and any other procedures set forth by ASI and Cal Poly Clubs & Organizations Office.

Funds: Recognized Student Organization funds shall be held in trust by the campus through ASI unless granted a specific exception by the University Controller.

Activities: Recognized Student Organizations engage in activities that:

- are conducted by Cal Poly students.
- promote Cal Poly students' knowledge about common interests.
- promote the social and cultural development of Cal Poly students and/or enhance the academic career of Cal Poly student members.

Recognized Student Organizations shall:

- strive to enhance the university mission.
- strive to project a positive public image of the RSO and the university.
- create beneficial opportunities for personal and professional development of Cal Poly students.
- engage in activities that align with university or CSU policy.

Recognized Student Organizations shall not:

- supplant the purposes of any other university program, project, or department.
- engage in or promote activities that endanger or harm the health and safety of any persons or that endanger, damage, or harm university property, facilities, or assets.
- engage in or promote activities not allowed in the RSO charter or otherwise prohibited by the university or CSU.
- use funds collected by the RSO for purposes that result in the personal benefit of any member of the club or any other person or entity.
- engage in commercial for-profit activities.
- endorse any commercial products or services.

Membership and Officer Eligibility

An RSO shall consist of no fewer than five matriculated Cal Poly students and 100% of the student organization membership shall be matriculated Cal Poly students.

Each RSO shall have at a minimum a president and treasurer. Any such president and treasurer shall:

- Comply with the California State University definition of Minor Student Representative Officers in [Executive Order 1068](#).
- Be matriculated Cal Poly students.
- Maintain a minimum overall 2.0 grade point average each academic year.
- Be in good standing and shall not be on probation of any kind.
- Attend a minimum of two academic quarters during the academic year.
- If undergraduate students, earn at least nine student credit units per quarter while holding office, or, if graduate and credential students, earn at least four student credit units per quarter while holding office.
- If undergraduate students, 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, while holding office, or, if graduate students, 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, while holding office.

Starting a New RSO

A group of students may petition the university for official recognition as a RSO upon a full disclosure of proposed activities and upon declaring the intent to comply with the language and spirit of CAP 620. Starting a new organization is a process that requires the participation of the prospective RSO, Cal Poly Clubs & Organizations, ASI Club Services, Risk Management, and campus partners on the RSO Petition Review Committee. The following campus partners will also be asked to review relevant petitions:

- For academic councils, the dean of that college or their designee
- For social fraternities and sororities, the assistant director of Fraternity & Sorority Life
- For esports organizations, the advisor of Esports Council
- For sports clubs, the advisor of Club Sports Council
- Cal Poly Facilities and/or ASI Facilities

The RSO Petition Committee reviews petitions for legitimacy and provides a recommendation for recognition. The committee evaluates the risks associated with any proposed RSO charter and/or activities; and for provides appropriate risk management and insurance measures. RSOs may be required to provide funds for all or part of the cost of insurance or other risk management expenses.

A list of new RSOs that are recommended for registration by the RSO Petition Review Committee will be posted on Cal Poly for public review for 14 days. During this time, members of the Cal Poly community can submit feedback on the prospective RSO.

Cal Poly Clubs & Organizations shall be responsible for determining final eligibility for recognition based on the recommendation of the RSO Petition Committee, input from campus partners, and any public comments.

Petitions for recognition are accepted during the first three weeks of each quarter. The schedule for petition review, as well as step-by-step instructions, are available on the [Your Go-To Guide to Starting a Club](#) page.

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

Re-Registering an RSO

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 officer training annually. Additionally, every RSO must re-register and submit a roster of all active club members each year. The RSO must also reregister for recognition any time the president changes.

ANNUAL REGISTRATION TIMELINE

	Recognized Student Organizations	Fraternity & Sorority Life Chapters
Regular Registration Opens	April 1	November 15
Regular Registration Closes	June 30	December 31
Late Registration Opens	July 15	January 15
Late Registration Closes	March 15	November 1

OFFICER TRAINING

The online training can be found on [Cal Poly Now](#). The president, treasurer, and advisor must complete the training annually as a prerequisite for recognition status. If the club has a co-president, co-advisor, or more than one treasurer, the holder of each of these positions must also complete the training and meet the eligibility requirements. Each training takes approximately 45 minutes to complete. The training does not have to be completed during one session.

FROZEN ORGANIZATIONS

If an RSO does not complete the annual registration requirements by the registration deadline or if an officer becomes ineligible, the RSO will become Frozen.

Frozen RSOs cannot:

- Submit E-Plans or Event Requests
- Host events or activities

- Conduct any club business
- Access club funds

To regain Active status, the RSO must re-register the organization or submit an Organization Change Form, depending on the circumstances. If an organization does not reactive their status within 14 days, any previously scheduled events will be canceled.

INACTIVE ORGANIZATIONS

After two years of inactivity, defined by non-renewal of an RSO registration, an RSO will be deemed Inactive. Funds of Inactive 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 their funds.

Members of an Inactive RSO may petition for university recognition following the process outlined under Starting a New RSO.

Reinstatement of Recognition

A RSO may be involuntarily separated from the university for a specified period or permanently. Conditions for reinstatement may be imposed. Student organizations with recognition status suspended or removed because of a sanction decision issued by the university must make a formal written request to be reinstated to the Dean of Students or designee before recognition will be considered.

Upon receipt of the written request, the Dean of Students or designee may present to the student organization additional requirements deemed necessary for making an informed decision. One of the requirements may be that a representative(s) of the student organization participate with the Office of Student Rights and Responsibilities (OSRR), offering their full cooperation. If the OSRR representative is not satisfied that the student organization has acted in accordance with the terms of or the intent behind the sanction, the OSRR representative will report that conclusion to the Dean of Students or designee. The Dean of Students or designee will strongly consider such a conclusion when deciding. If the Dean of Students is in support of reinstatement, they will provide a letter of support. The organization will then need to petition for recognition (see Starting a New RSO).

Student organization representatives who wish to join or rejoin a Club Council following a suspension of recognition status may be required to present before the Club Council. Regardless of the observations or determinations of council members, Cal Poly Clubs & Organizations reserves the right to make the final determination of the recognition status of the student organization.

Guidance for admission or readmission to a council varies based upon the council. If the council is affiliated with another organization or college, that affiliate organization may require compliance with their expansion practices.

If the sanction was a permanent removal of recognition, the RSO may not make such a request for reinstatement.

Organization Changes

REQUIRED OFFICER CHANGES

A president must submit an Organization Change Form to do any of the following:

- Add or replace a co-president
- Replace a treasurer
- Add or remove a co-treasurer
- Replace an advisor
- Add or remove a co-advisor

Recognized Student Organizations cannot replace a president via an Organization Change Form. To replace a president, the new president must re-register the RSO.

When an RSO wishes to make changes to their co-president, treasurer, and/or advisor position(s), the president must submit an Organization Change Form.

If the form is not replacing the advisor, the advisor must be added as a reviewer to the form, and they must vote in support of the submission. If the form is requesting a replacement advisor, then the replacement advisor must be added as a reviewer, and they must vote in favor of the submission.

Any new officers/advisors will need to complete Club Officer & Advisor Training and eligibility will be confirmed by Cal Poly Clubs & Organizations prior to approval of the changes.

OPTIONAL OFFICER CHANGES

RSOs can add as many optional officers to their roster as desired. To add optional officer positions, the president can manage positions in the Roster tool.

UPDATING BYLAWS OR CHANGING YOUR ORGANIZATION NAME

When an RSO wishes to update their bylaws or change their name, new bylaws must be written using the [Bylaw Builder](#). The amended bylaws will be reviewed by Cal Poly Clubs & Organizations and the RSO advisor. If approved, the RSO will be notified, and the revised bylaws will be posted on the organization's Cal Poly Now page. Bylaws must also be updated to change the name of the organization.

PRINCIPLES OF COMMUNITY

Cal Poly comprises a diverse community. Campus life and daily interactions are enriched by our acceptance and fostering of diversity and inclusion 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 for 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.

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 that 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 does not interfere 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 [Office of the Dean of Students](#).

RECOGNIZED STUDENT ORGANIZATION CODE OF CONDUCT

Recognized Student Organizations are subject to all university policies and rules and are responsible for the conduct of their members and guests. 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](#), 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 [Executive Order 1068](#) and sets forth the Code of Conduct for Cal Poly Recognized Student Organizations (RSOs). All campus RSOs are 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 868](#) and [1109](#) regarding Alcohol; [CSU Executive Order 1068](#) (Student Activities); and [Cal Poly Alcohol Policy \(CAP 172\)](#).

Authority and responsibility for administering this RSO Code of Conduct is delegated by the campus president to the vice president for student affairs or designee. At Cal Poly, that designee is the Office of Student Rights & Responsibilities.

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

RSOs shall not discriminate on the basis of any protected status, which includes Age, Disability (physical and mental), Gender (or sex, including sex stereotyping), Gender Identity (including transgender), Gender Expression, Genetic Information, Marital Status, Medical Condition, Nationality, Race or Ethnicity (including color, caste, or ancestry), Religion (or religious creed), Sexual Orientation, and Veteran or Military Status. The prohibition on membership policies that discriminate on the basis of gender does not apply to social fraternities and 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 club sports.

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 1098](#). 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.

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, discrimination, harassment, sexual misconduct, sexual exploitation, domestic violence, dating violence, stalking, retaliation, 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 sanction decision has been reached at the discretion of the Dean of Students or designee.

Procedure

The Office of Student Rights & Responsibilities (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). The Office of Student Rights & Responsibilities 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 discrimination, harassment, sexual misconduct, sexual exploitation, dating violence, domestic violence, stalking, and retaliation will be addressed by the Civil Rights & Compliance Office, which is the campus Title IX Coordinator/DHR Administrator in accordance with the policy and procedures set forth in the [Interim CSU Non-Discrimination Policy \(EO 1095\)](#)

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 any procedural 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 by a preponderance of evidence standard, 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 appeal 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. Unless required by law, 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 record indefinitely.

Unacceptable Student Organization/Member Conduct

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

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 141.3.2.1](#).
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 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 245.6](#)), 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.
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 Alcohol Policy](#) 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.
 - c. Misuse of funds, including RSO, state, and ASI funds.
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.** Unauthorized possession, use, or misuse of firearms or guns, including weapon replicas, ammunition, explosives, fireworks, knives, tasers, 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.
 - 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. **Student Organization Events.**
 - g. Failure to comply with event approval conditions imposed by Cal Poly Clubs & Organizations or other university offices.
 - h. Failure to comply with the policies governing student organization events held on campus or funded by the university or a university auxiliary organization.
 - i. Failure by a fraternity or sorority to comply with the Event Registration Policy.
23. **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 Students, Inc. 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, Inc. program.

Nondiscrimination

The California State University (CSU) is committed to an inclusive and equitable community that values diversity and fosters mutual respect. We embrace our community differences in Age, Disability (physical and mental), Gender, Gender Identity (including Nonbinary or Transgender), Gender Expression, Genetic Information, Marital Status, Medical Condition, Nationality, Pregnancy or related conditions, Race or Ethnicity (including color, caste, or ancestry), Religion or Religious Creed, Sex (including Sex Stereotyping or Sex Characteristics), Sexual Orientation, and Veteran or Military Status. All Students and Employees have the right to participate fully in CSU programs, activities, admission, and employment free from Discrimination, Harassment, Sexual Misconduct, Sexual Exploitation, Dating Violence, Domestic Violence, Stalking and Retaliation.

PROHIBITED CONDUCT

[The Interim CSU Nondiscrimination Policy \(Executive Order 1065\)](#) prohibits the following conduct as defined below:

1. **Discrimination** is conduct that causes harm to a Complainant based on their actual or perceived Protected Status within the CSU’s educational programs, activities, or employment which results in the denial or limitation of services, benefits, or opportunities provided by the CSU. Under this Nondiscrimination Policy, the definition of Discrimination includes:
 - a. **Different Treatment Discrimination:** Different Treatment Discrimination occurs when the Complainant is: 1) treated less favorably; 2) than other similarly situated individuals under similar circumstances; 3) because of the Complainant’s actual or perceived Protected Status; and 4) not for a legitimate, nondiscriminatory reason. Insignificant or trivial actions or conduct not reasonably likely to do more than anger or upset a Complainant do not constitute “Different Treatment Discrimination.”
 - I. Under this Nondiscrimination Policy, discrimination in employment includes any adverse employment action or conduct that is reasonably likely to impair the Employee's job performance or prospects for advancement or promotion.
 - II. An allegation that an Employee is receiving unequal pay because of their Protected Status (for example, under the California Equal Pay Act) constitutes a Discrimination Complaint under this Nondiscrimination Policy.

- b. Disparate Impact Discrimination: Disparate Impact Discrimination occurs when a policy or practice that is neutral on its face has a disproportionate, adverse effect on individuals of a particular Protected Status.
 - c. Note: Disparate Impact Discrimination cases will follow the Procedures outlined in Attachment I.
2. **Harassment** means unwelcome verbal, nonverbal or physical conduct engaged in because of an individual Complainant's Protected Status. Harassment includes, but is not limited to, verbal harassment (e.g., epithets, derogatory comments, or slurs), physical harassment (e.g., assault, impeding or blocking movement, or any physical interference with normal work or movement), and visual forms of harassment (e.g., derogatory posters, cartoons, drawings, symbols, or gestures.). Single, isolated incidents will typically be insufficient to rise to the level of Harassment.

Harassment may occur when:

- a. Submitting to, or rejecting, the verbal, nonverbal or physical conduct is explicitly or implicitly a basis for:
 - I. Any decision affecting a term or condition of the Complainant's employment; or
 - II. Any decision affecting a Complainant's academic status or progress, or access to benefits and services, honors, programs, or activities available at or through the University.

OR

- b. The conduct is sufficiently severe or pervasive so that its effect, whether intended or not, could be considered by a reasonable person under similar circumstances and with similar identities, and is in fact considered by the Complainant, as creating an intimidating, hostile, or offensive work or educational environment that denies or substantially limits an individual's ability to participate in or benefit from employment and/or educational, services, activities, or other privileges provided by the CSU.

Whether a hostile environment has been created is a fact-specific inquiry that includes consideration of the following:

- I. The frequency, nature, and duration of the conduct;
 - II. Whether the conduct was physically threatening;
 - III. Whether the conduct arose in the context of other discriminatory conduct or other misconduct;
 - IV. The degree to which the conduct affected the Complainant's ability to access the CSU's educational programs, activities or employment;
 - V. The Parties' ages, roles within the CSU's educational programs or activities, previous interactions, and other factors about each Party that may be relevant to evaluating the effects of the conduct; and
 - VI. Other Harassment in the CSU's educational programs, activities, or employment.
3. **Sex-based Harassment** is a form of sex discrimination and means Sexual Harassment and other Harassment on the basis of Sex or Gender, including Gender Expression, Gender Identity, Pregnancy or related conditions, Sex Stereotypes, Sex Characteristics, or Sexual Orientation, including:
- a. Hostile environment or Quid Pro Quo Harassment (e.g., when an Employee conditions a benefit on a Complainant's participation in unwelcome sexual conduct);
 - b. Specific offenses (e.g., Dating Violence, Domestic Violence, Sexual Exploitation, and Stalking); and/or
 - c. Sexual Misconduct

4. **Sexual Misconduct** means engaging in any sexual activity without first obtaining Affirmative Consent to the specific activity, whether or not the conduct violates any civil or criminal law. All sexual activity between members of the CSU community must be based on Affirmative Consent.
 - a. Sexual Misconduct includes, but is not limited to, the following conduct:
 - I. **Sexual Assault**, which includes:
 1. **Rape** is the penetration, or attempted penetration, no matter how slight, of the vagina or anus with any body part or object, or oral penetration by a sex organ of another person, without the Affirmative Consent of the Complainant. Rape also includes the attempted penetration, no matter how slight, of the vagina or anus with any body part or object, or oral penetration by a sex organ of another person, without the Affirmative Consent of the Complainant, with the present ability and the intent to commit Rape.
 2. **Fondling** is the touching of the private body parts of another person for the purpose of sexual gratification, without the Affirmative Consent of the victim, including instances where the Complainant is incapable of giving Affirmative Consent because of their age or because of their temporary or permanent mental incapacity.
 3. **Incest** is sexual intercourse between persons who are related to each other within the degrees wherein marriage is prohibited by law.
 4. **Statutory Rape** is sexual intercourse with a person who is under the age of 18 years, the California statutory age of consent.
 - II. an attempt, coupled with the ability, to commit a violent injury on the person of another because of that person's Gender or Sex,
 - III. the intentional touching of another person's private body parts without Affirmative Consent,
 - IV. intentionally causing a person to touch the private body parts of another without Affirmative Consent,
 - V. using a person's own private body part to intentionally touch another person's body without Affirmative Consent,
 - VI. any unwelcome physical sexual acts, such as unwelcome sexual touching,
 - VII. using physical force, violence, threat, or intimidation to engage in sexual activity,
 - VIII. ignoring the objections of the other person to engage in sexual activity,
 - IX. causing the other person's incapacitation through the use of drugs or alcohol to engage in sexual activity,
 - X. taking advantage of the other person's incapacitation to engage in sexual activity
 1. Private body part means the sexual organ, anus, groin, buttocks, or breasts of any person.
 2. Sexual activity between a Minor and a person who is at least 18 and two years older than the Minor always constitutes Sexual Misconduct, even if there is Affirmative Consent to all sexual activity. The existence of Affirmative Consent and/or the type of sexual activity may be relevant to the determination of an appropriate Disciplinary Sanction.
 3. Persons of all Genders, Gender Identities, Gender Expressions, and Sexual Orientations can be victims of these forms of Sexual Misconduct. Sexual Misconduct can be committed by an individual known to the victim including a person the Complainant may have just met, i.e., at a party, introduced through a friend, or on a social networking website.
 4. California law requires the CSU to describe how it will respond to instances of stranger and non-stranger Sexual Assault. The CSU applies the same policies and sanctions for both stranger and non-stranger Sexual Assault. For the purposes of this Policy, a non-stranger is someone known to the Complainant, whether through a casual meeting or through a longstanding relationship, including a dating or domestic relationship. A stranger is someone unknown to the Complainant at the time of the Sexual Assault.
 - b. Sexual activity includes, but is not limited to:

- I. kissing,
 - II. touching private body parts
 - III. fondling,
 - IV. intercourse,
 - V. penetration, no matter how slight, of the vagina or anus with any part or object,
 - VI. oral copulation of a sex organ by another person.
- c. **Affirmative Consent** means an agreement to engage in sexual activity that is informed, affirmative, conscious, voluntary, and mutual. Affirmative Consent must be given freely and without coercion, force, threats, intimidation, or by taking advantage of another person's incapacitation. It is the responsibility of each person involved in the sexual activity to ensure Affirmative Consent has been obtained from the other participant(s) prior to engaging in the sexual activity.
- I. Affirmative consent is given by clear words or actions. Affirmative consent includes knowledge and agreement to engage in the specific sexual activity.
 - II. Affirmative Consent must be ongoing throughout a sexual activity and can be withdrawn or revoked at any time, including after sexual activity begins. Once consent is withdrawn or revoked and clearly communicated, the sexual activity must stop immediately.
 - III. 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.
 - IV. Affirmative Consent cannot be inferred from an existing or previous dating, social, or sexual relationship between the Parties.
 - V. Silence does not mean there is Affirmative Consent.
 - VI. Lack of protest or resistance does not mean there is Affirmative Consent.
 - VII. A request for someone to use a condom or birth control does not, in and of itself, mean there is Affirmative Consent.
 - VIII. 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.
- d. **Incapacitation:** A person is incapacitated if they lack the physical and/or mental ability to make informed, rational decisions about whether or not to engage in sexual activity. A person with a medical or mental disability may also lack the capacity to give consent. Incapacitation exists when a person could not understand the fact, nature, or extent of the sexual activity.
- I. 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:
 - 1. The person was asleep or unconscious;
 - 2. 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
 - 3. The person was unable to communicate due to a physical or mental condition.
 - II. 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:
 - 1. The Respondent's belief in Affirmative Consent arose from the intoxication or recklessness of the Respondent;
 - 2. The Respondent did not take reasonable steps, in the circumstances known to the Respondent at the time, to ascertain whether the person affirmatively consented.
 - III. Whether an intoxicated person (as a result of using alcohol, drugs, or medication) is incapacitated will require an individualized determination about 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. The level of intoxication may change over a period of time based on a variety of individual factors, including the amount of

substance consumed, speed of intake, body mass, height, weight, tolerance, food consumption, drinking patterns, and metabolism. 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.

- IV. Incapacitation due to alcohol, drugs or medication is a state of intoxication that is so severe that it interferes with a person's capacity to make informed and knowing decisions. A person who is incapacitated may not be able to understand where they are, whom they are with, how they got there, or what is happening. Signs that a person may be incapacitated due to the influence of drugs, alcohol, or medication include, but are not limited to, the following:
 - 1. slurred speech or difficulty communicating clearly;
 - 2. clumsiness or lack of physical coordination (e.g., difficulty standing or walking without assistance);
 - 3. impaired motor skills (e.g., eating, drinking, texting);
 - 4. disorientation regarding time and place;
 - 5. difficulty concentrating;
 - 6. vomiting;
 - 7. combativeness or emotional volatility; or
 - 8. sleeping, unconsciousness, or going in and out of consciousness.
 - V. Incapacitation may also include memory impairment or an inability to recall entire or partial events (sometimes referred to as "black-out" or "brown-out"). A person may experience this symptom while appearing to be functioning "normally," including communicating through actions or words that can reasonably and objectively be interpreted as communicating consent to engage in sexual activity. Total or partial loss of memory, alone, may not be sufficient, without additional evidence, to prove that an individual was incapacitated under this Policy. Whether sexual activity under these circumstances constitutes Prohibited Conduct depends on the presence or absence of the outwardly observable factors indicating that an individual is incapacitated, as described above.
 - VI. In evaluating Affirmative Consent in cases involving incapacitation, the CSU considers the totality of available information in determining whether a Respondent knew or reasonably should have known that the Complainant was incapacitated.
5. **Sexual Harassment** means unwelcome verbal, nonverbal or physical conduct of a sexual nature that includes, but is not limited to, sexual advances, requests for sexual favors, offering employment benefits or giving preferential treatment in exchange for sexual favors, or any other conduct of a sexual nature. There are two kinds of Sexual Harassment:
- a. Quid pro quo: Quid pro quo is Latin for "this for that" and occurs when an Employee, agent, or other person in a position of power conditions an employment or educational benefit or service on submission to sexual advances or other conduct based on sex. Quid pro quo harassment exists when submitting to, or rejecting, the verbal, nonverbal or physical conduct is explicitly or implicitly a basis for:
 - I. Any decision affecting a term or condition of the Complainant's employment; or
 - II. Any decision affecting a Complainant's academic status or progress, or access to benefits and services, honors, programs, or activities available at or through the University.OR
 - b. Hostile environment harassment is unwelcome sex-based conduct that, based on the totality of the circumstances, is subjectively and objectively offensive and so severe, persistent, or pervasive that it limits or denies the Complainant's ability to participate in or benefit from the CSU's educational programs, activities, or employment. Hostile environment harassment must either:
 - I. Create an intimidating, hostile or offensive work environment; or

- II. Limit a Student's ability to participate in or benefit from the services, activities, or opportunities offered by the University. Whether a hostile environment has been created is a fact-specific inquiry that includes consideration of the following:
 4. The frequency, nature, and duration of the conduct;
 5. Whether the conduct was physically threatening;
 6. Whether the conduct arose in the context of other discriminatory conduct or other misconduct;
 7. The degree to which the conduct affected the Complainant's ability to access the CSU's educational programs, activities or employment;
 8. The Parties' ages, roles within the CSU's educational programs or activities, previous interactions, and other factors about each Party that may be relevant to evaluating the effects of the conduct; and
 9. Other Sex-based Harassment in the CSU's educational programs, activities, or employment. Sexual Harassment could include being forced to engage in unwanted sexual contact as a condition of membership in a student organization or in exchange for a raise or promotion; being subjected to video exploitation or a campaign of sexually explicit content; or frequently being exposed to unwanted images of a sexual nature in a work environment, or in a classroom where the images are unrelated to the coursework. Claiming that the conduct was not motivated by sexual desire is not a defense to a Complaint of Sexual Harassment.
6. **Sexual Exploitation** means a person taking sexual advantage of another person for the benefit of anyone other than that person without that person's consent, including, but not limited to, any of the following acts:
 - a. The prostituting of another person.
 - b. The trafficking of another person, defined as the inducement of a person to perform a commercial sex act, or labor of services, through force, fraud, or coercion.
 - c. The recording of images, including video or photograph, or audio of another person's sexual activity or intimate parts, without that person's consent.
 - d. The distribution of images, including video or photographs, or audio of another person's sexual activity or intimate parts, if the individual distributing the images or audio knows or should have known that the person depicted in the images or audio did not consent to the disclosure.
 - e. The viewing of another person's sexual activity or intimate parts, in a place where that other person would have a reasonable expectation of privacy, without that person's consent, for the purpose of arousing or gratifying sexual desire.
7. **Dating Violence** means physical violence or threat of physical violence committed by a person:
 - a. who is or has been in a social relationship of a romantic or intimate nature with the Complainant; **and**
 - b. where the existence of such a relationship shall be determined based on a consideration of the following factors:
 - i. The length of the relationship.
 - ii. The type of relationship.
 - iii. The frequency of interaction between the persons involved in the relationship.

Domestic Violence means physical violence or threat of physical violence committed by a current or former spouse or intimate partner of the Complainant, by a person with whom the Complainant shares a child in common, by a person who is cohabitating with or has cohabitated with the Complainant as a spouse or intimate partner, or by a person similarly situated to a spouse of the Complainant.

Physical violence means physical conduct that intentionally or recklessly threatens the health and safety of the recipient of the behavior, including assault.

8. **Domestic Violence** means Physical Violence or threat of Physical Violence committed by a current or former spouse or intimate partner of the Complainant, by a person with whom the Complainant shares a child in common, by a person who is cohabitating with or has cohabitated with the Complainant as a spouse or intimate partner, or by a person similarly situated to a spouse of the Complainant. Domestic violence also includes acts against a Minor or adult victim who is protected from those acts under the family or domestic laws of the state.
9. **Stalking** - Stalking means engaging in a Course of Conduct directed at a specific person that would cause a reasonable person to fear for the safety of self or others' safety or to suffer Substantial Emotional Distress. For purposes of this definition:
 - a. Course of Conduct means two or more acts, including but not limited to, acts in which one party directly, indirectly, or through third parties, by any action, method, device, or means, follows, monitors, observes, surveils, threatens, or communicates to or about the other party, or interferes with the other party's property.
 - b. Substantial Emotional Distress means significant mental suffering or anguish that may but does not necessarily require medical or other professional treatment or counseling.
10. **Prohibited Consensual Relationships** include consensual sexual or romantic relationships between an Employee and any Student or Employee over whom they exercise direct or otherwise significant academic, administrative, supervisory, evaluative, counseling, or extracurricular authority.
 - a. A consensual relationship means a sexual or romantic relationship between two individuals who voluntarily enter into such a relationship.
 - b. While sexual and/or romantic relationships between members of the University community may begin as consensual, they may evolve into situations that lead to Discrimination, Harassment, Retaliation, Sexual Misconduct, Sexual Exploitation, Dating Violence, Domestic Violence, or Stalking subject to this Nondiscrimination Policy.
 - c. It is a violation of this Nondiscrimination Policy for an Employee to enter into a Prohibited Consensual Relationship.
 - d. Examples of Prohibited Consensual Relationships include, but are not limited to, a supervisor and an employee in their chain of command; a faculty member and a student enrolled in their class; a counselor and a student they are advising; a resident advisor and a student in their building; a club advisor and club member.
11. **Retaliation** is intimidation, coercion, or discrimination against any individual for the purpose of interfering with their exercise of any rights under this Nondiscrimination Policy by:
 - a. Reporting or filing a Complaint;
 - b. Participating or refusing to participate in any manner in any Policy-related investigation or proceeding, including a hearing;
 - c. Opposing conduct which was reasonably and in good faith believed to be in violation of this Nondiscrimination Policy;
 - d. Assisting or participating in an investigation or proceeding under this Nondiscrimination Policy, regardless of whether the Complaint was substantiated; or
 - e. Assisting someone else in reporting or opposing a violation of this Nondiscrimination Policy or assisting someone else in reporting or opposing Retaliation under this Nondiscrimination Policy.
 - I. For purposes of this definition, Retaliation includes conduct that would discourage a reasonable person from reporting or participating in a process provided for in this Policy, including threats, intimidation, coercion, reprisals, discrimination, and adverse employment or educational actions.
 - II. Peer Retaliation, which is defined as Retaliation by one Student against another Student, is also prohibited.
 - III. Retaliation may occur even when there is not a power or authority differential between the individuals involved.

- IV. The exercise of rights protected under the First Amendment does not constitute Retaliation prohibited under this definition.
- V. Good faith actions lawfully pursued in response to a Complaint, such as gathering evidence, providing Supportive Measures, or disciplining Students or Employees found to be in violation of this Nondiscrimination Policy, without more, are not considered Retaliation.

HOW DO I FILE A COMPLAINT?

The decision to file a complaint is yours. You can confidentially discuss your options for supportive measures and reporting with a state-certified, confidential Campus Advocate from Safer. Services are available [by appointment](#) and walk-in, with in-person and virtual options.

A complaint form may be filled out and filed with the Civil Rights & Compliance Office and/or the Title IX Coordinator/DHR Administrator, 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 [Civil Rights & Compliance Office](#).

You may file a complaint with the Civil Rights & Compliance Office using these processes and/or with Cal Poly Police Department or local law enforcement.

Under the CSU Policy 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 1095](#) are mandatory reporters.

WHERE TO REPORT

CIVIL RIGHTS & COMPLIANCE OFFICE

Location: Fisher Science, Building 33 Room 290
Phone: 805.756.6770 or email: crco@calpoly.edu

CAL POLY POLICE DEPARTMENT

Emergency: Dial 911
Non-emergency: 805.756.2281
Email: police@calpoly.edu
<https://afd.calpoly.edu/police/>

LOCAL POLICE

San Luis Obispo Police
Emergency: Dial 911
Non-Emergency Police Services: 805.781.7317
Address: 1042 Walnut (at Santa Rosa)

MEDICAL & COUNSELING SERVICES

CAL POLY HEALTH CENTER

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

CAL POLY COUNSELING SERVICES

Location: Building 27, Room 136
Hearing or Speech Impaired: Call 711
Website: <https://hcs.calpoly.edu/counseling>
Phone: 805.756.2511
Local Crisis Hotline: 800.783.0607

The university encourages reporting to the Civil Rights & Compliance Office 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 supportive measures such as schedule changes, housing changes, and/or other academic support may be arranged if requested. No-contact orders may also be requested. Students may also access confidential resources.

CONFIDENTIAL RESOURCES

CAL POLY SAFER (ON-CAMPUS)

Confidential, state-certified Advocates available to students, faculty, and staff. Prevention education, club workshops, and consultations.
<https://safer.calpoly.edu>
805.756.2282

CAL POLY COUNSELING SERVICES (ON-CAMPUS)

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

LUMINA ALLIANCE (OFF-CAMPUS)

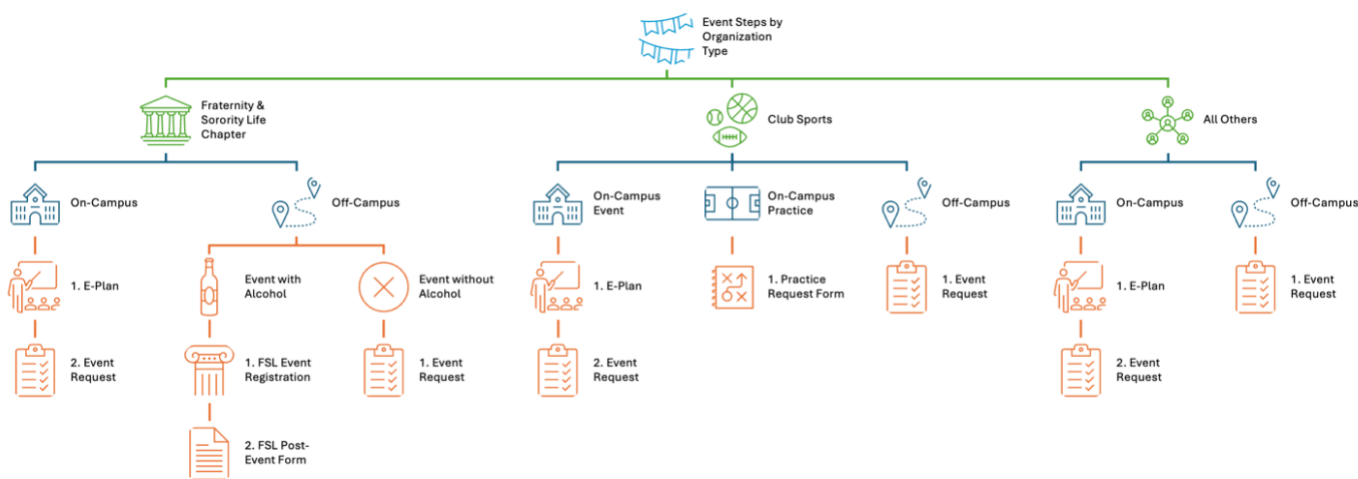
<https://luminaalliance.org/>
Crisis and Information Line: 805.545.8888

EVENTS

RSOs are responsible for their own events and activities. The goal of Clubs & Organizations and ASI is to assist student groups in having successful events in a safe environment. Cal Poly does not assume liability or provide any warranties for RSO events and activities. The following information is provided so that clubs may plan events that are safe and successful.

The following changes are in effect for 2024-25 to make the club event request process as streamlined as possible.

- E-Plans are no longer required for off-campus activities. The E-Plan has been simplified and is now an on-campus space request.
- The Club Risk Assessment is now called Cal Poly Now Event Request (or simply Event Request).



ALL CLUBS*

EVENT TYPE	REQUIRED PROCESS(ES)
On-Campus	1. ASI E-Plan 2. Cal Poly Now Event Request
Off-Campus	1. Cal Poly Now Event Request

*Except Club Sports and Fraternity & Sorority Life

CLUB SPORTS

EVENT TYPE	REQUIRED PROCESS(ES)
On-Campus	1. ASI E-Plan 2. Cal Poly Now Event Request
Off-Campus	1. Cal Poly Now Event Request
Club Sports Practices – On-Campus	1. Practice Request Form
Club Sports Practices – Off-Campus	1. Cal Poly Now Event Request

FRATERNITY & SORORITY LIFE

EVENT TYPE	REQUIRED PROCESS(ES)
On-Campus	1. ASI E-Plan 2. Cal Poly Now Event Request
Off-Campus Event Without Alcohol	1. Cal Poly Now Event Request
Off-Campus Event with Alcohol and/or at Private Residence	1. FSL Event Registration 2. FSL Post-Event Form

PLEASE NOTE: Additional steps may be required depending on the details of your club activity. Your Event Request will inform you of most required action steps. All requirements will be communicated to the event contact directly. Examples include, but are not limited to:

- Temporary Food Facility Permits for clubs wishing to cook food on campus
- Production Schedules for ASI-managed spaces
- Transportation and Parking Services (TAPS) approval for parking and/or run/walk routes
- Facilities requests for waste, spider boxes, etc.
- Risk management approval of contracts, vendors, etc.

An activity is not **confirmed** until all required steps are completed, and you receive an event confirmation.

For questions:

- ASI E-Plan // ASI Facility Scheduling (asieplan@calpoly.edu)
- Event Request // Clubs & Organizations (clubs@calpoly.edu)

E-Plans

If the activity is on-campus, the RSO is also required to submit an E-Plan.

ASI partners with the university to facilitate the E-Plan process. An E-Plan serves as a facility request tool for RSOs to request on-campus space and coordinate services with campus entities.. All on-campus requests must be submitted via an online E-Plan. Any club member can 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 seven (7) days, fourteen (14) days, or twenty-one (21) days based on event details.

EVENT TIMELINE REQUIREMENTS

7 CALENDAR DAYS

The E-Plan must be submitted and approved online by the club president and advisor at least seven (7) calendar 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, and/or chalking (campus-wide).
- Events which require no staffing, set-up or audio visual.
- 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
- Recreation Center Studios
- Department Managed Space

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 events that include any of the following:

- Outdoor Lawn Locations
- Advanced Technology Lab
- Performing Arts Center
- Spanos Theater
- Mott Complex
- Food Preparation by RSO

21 CALENDAR DAYS

Events that require staffing, set-up, audio visual, the E-Plan must be submitted and approved online by the club president and advisor a minimum of 21 calendar days prior to the date requested for events that include any of the following:

- Chumash Auditorium
- University Union 220
- University Union Marketplace Plaza & Stage
- Recreation Center
- Sports Complex
- The Forum

INITIATING THE E-PLAN

The E-Plan can be found on the [ASI website](#). The club member will be directed to the Cal Poly portal to authenticate their account. Once authenticated, they will be routed to the E-Plan. To start a new E-Plan, select “Create a New E-Plan.” A step-by-step tutorial on submitting an [E-plan](#) is on Cal Poly Now.

OBTAIN REQUIRED APPROVALS

While any club member may initiate an E-Plan, the E-Plan requires approval from the recognized president and advisor. 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 by 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 platform allows you to check the status of an E-Plan that you have previously submitted or approved. To do so, locate your event and 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 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.

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.

Event Requests

RSOs are required to submit Event Requests for all in-person activities, both on- and off-campus. For on-campus events, an E-Plan Reference number is required to submit an Event Request (see E-Plans). A step-by-step tutorial on [Event Requests](#) is available on Cal Poly Now. Social Fraternity & Sorority Life (FSL) organizations are not required to submit Event Requests for off-campus events with alcohol but must provide information about off-campus events to FSL staff via the FSL Event Registration Process.

PRESIDENT REVIEW

After submission, the request will be sent automatically to the RSO President for review. If the president is in support of the event, they will vote with the green “thumbs up” button.

ADVISOR REVIEW

After the president votes in favor of the event, the submission will be sent automatically to the RSO advisor for review. If the advisor is in support of the event, they will vote with the green ‘thumbs up’ button.

CLUBS & ORGANIZATIONS REVIEW

After the advisor votes in favor of the event, the submission will be sent automatically to Cal Poly Clubs & Organizations for review. The submitter will be notified if the event is approved or denied. If the event is denied, the submitter can revise the original submission and re-submit for approval. A new Event Request is not necessary. Once approved, the event will be displayed in Cal Poly Now to the audience specified in the Event Request. Approval does not signify that Cal Poly warrants any aspect of the event, including safety or legal compliance.

OTHER CAMPUS DEPARTMENT REVIEW

Depending on your event details, additional departments may require review and approval. This includes, but is not limited to ASI, Risk Management, Catering, SEF,

Add Risk Management/Catering/SEF review?

EVENT TIMELINE REQUIREMENTS

Event Requests must be submitted a minimum of seven (7) days prior to the event.

Virtual Events

For virtual events, no Event Request is needed but RSOs are welcome to create their virtual events on Cal Poly Now for marketing purposes.

Food Policy

All events on campus involving food must follow the [RSO Food Policy](#).

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 a vendor is willing to donate food for an event, a [Donation Request Form](#) 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](#).

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 registered with the Fraternity & Sorority Life Office by a social 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 FSL Event Registration Policy. The facility or caterer must provide a valid Alcohol Beverage Control (ABC) license 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:

- Event Request
- Contract with a licensed vendor
- 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 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 Event Request. 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 [QSRR](#).

See [Cal Poly Alcohol Policy \(CAP 172\)](#) regarding on- and off-campus use, service, sale, and consumption for more detailed information. Refer to [Fraternity and Sorority Life Event Registration Procedure](#) regarding registration of off-campus events where alcohol is present for more detailed information.

Club Contracting for Services

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 advisor. It is the responsibility of the club and club officers to facilitate this review. RSOs hosting on-campus events that require a contract are required to submit a copy of the contract to the university for review via the Event Request process prior to the event as a prerequisite for the approval process.

Income Producing and Fundraising Activities

The use of university property for commercial purposes is prohibited unless prior written permission has been obtained from the university (Interim Systemwide Time, Place and Manner Policy; CAP 143). For Cal Poly, the designee is Cal Poly Partners (CPP, formerly Cal Poly Corporation). An event of this type is only allowed if each student vendor has a contract with Partners. There is a process for pop-up vendors, which entails a booth fee and a CPP-provided POS system. The RSO must provide a list of the vendor(s) and proof of their approval from CPP before an event of this type could be approved.

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 Event Request process. The Clubs & Organizations Office is responsible for providing guidance and approval for sporting activities. All individuals participating in sporting events must complete a Waiver of Liability form to be submitted to Cal Poly Clubs & Organizations within 48 hours after the event.

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.

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, but are not limited to:

- Automobile Liability
- Alcohol furnished at club activities/events
- Fraternal Organizations (men and women)
- Hazing
- Athletic activities (except Club Sports)
- 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 [Additional Insurance Options](#) 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, RSOs must require participants to complete a CSU WAIVER OF LIABILITY, PROMISE NOT TO SUE, ASSUMPTION OF RISK AND AGREEMENT TO PAY CLAIMS. The Release of Liability 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 does not release RSOs from the responsibility of providing a safe environment for the activity.

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; \$2,000,000.00 aggregate. Submit proof of insurance to the Cal Poly Clubs & Organizations office.

Special Circumstances

YOUTH PROGRAMS

Typical youth programs include, but are not limited to, instructional programs, day camps, overnight camps, and sports camps where minors are participating. Minors are defined as individuals who are under 18 years old. All events, operations or activities, in-person or virtual, designed for participation by youth organized by Cal Poly, either on-campus or off-campus, in which youth program personnel are responsible for the care, custody, or control of youth fall under the [Youth Protection Program](#).

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. Club Sports practices and events are exempt from this restriction.

INELIGIBLE OFF-CAMPUS EVENTS AND ACTIVITIES

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
- helicopter rides

The university, through Cal Poly Clubs & Organizations will determine on a case-by-case basis whether an event or activity is ineligible.

STUDENT TRAVEL

Clubs, except for Club Sport teams that are represented by the Club Sports Council, are not required to submit paperwork for travel. An Event Request is still required. RSOs choosing to travel out of the country must work with the Cal Poly International Center.

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 Cal Poly Clubs & Organizations as soon as possible so that the university can offer support and resources for students.

For on-campus problems or emergencies, contact Cal Poly 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, Cal Poly Police 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

Cal Poly Now

Cal Poly Now has an Organization Directory all active and recognized Cal Poly RSOs. For public viewers (those not logged in to Cal Poly Now), the Organizations directory will display the names of the RSO's officers and advisor(s). A "CONTACT" button allows guests to submit a message to the club's president/primary contact without revealing their contact information. If provided, this guest view will also display a club email, address, phone, and any social media links.

To those logged in with a valid Cal Poly Single Sign-On (SSO), each organization's page will also show a 'REQUEST TO JOIN' button.

Club officers can control what information is displayed by editing their About section in the organization's Tool Drawer.

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, the president can submit a [Request for a Cal Poly Email](#) form found on the Forms tab. Once the form is submitted and the advisor votes in support of the submission, the information will be forwarded to Cal Poly Information Technology Services.

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

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.

Cal Poly clubs will no longer have physical club mailboxes, but mail can be delivered to campus for pick up during the open hours of ASI Club Services. If your club is interested in using this service, please use the following address:

Club Name / ASI Club Services
1 Grand Avenue
San Luis Obispo, CA 93407-0675

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 unclaimed mail will be forwarded to the advisor at the end of the academic year.

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).

- When planning meetings for the year, the group should try to designate times that are convenient for the advisor(s) to attend the meetings.
- Meeting minutes, 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.
- The advisor(s) may be removed by a two-thirds vote of the membership at a regularly

scheduled organization meeting or at the discretion of the university. Replacement is not finalized until an Organization Change Form is submitted and approved.

Advisor Responsibilities to the RSO

All RSOs recognized for the academic year must have an advisor who is a university employee (i.e., California Polytechnic State University employee or employee of one of Cal Poly's auxiliaries). The advisor's employment will be verified by Cal Poly Clubs & Organizations as part of the re-registration 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 mission of 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.

- 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 and Event Requests. Failure to authorize E-Plans and Event Requests within the proper timelines will result in the denial of the request.
- Review expenditures, support budget planning, and monitor financial records.
- Carefully review and authorize all RSO Purchase Requests and accompanying original/itemized receipts and invoices. Purchase Requests must have the advisor's signature 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 Organization Change Forms, Bylaw Builder forms, 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 Clery crime to their advisor, the advisor is required to submit a report with Cal Poly Police by either calling Dispatch at (805) 756-2281 or submit an online [CSA Reporting Form](#). CSA reports must include the following, if known:
 - The crime that was reported and the information provided
 - The exact location where the reported crime occurred
 - The date and time the reported crime occurred
 - Any witness and perpetrator information
 - Victim information unless the victim requests confidentiality. (Employees may be required to share this information with other offices if they have responsibilities under other laws and policies including, but not limited

to, Mandatory Reporting of Child Abuse and Neglect, and Nondiscrimination Policy).

- If the advisor becomes aware of a missing or potentially missing person, the advisor must report the incident to Cal Poly Police 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. Visit the [TipNow](#) page for more information. For questions regarding the Clery Act or the reporting of crimes at Cal Poly, please contact the Clery Manager at (805) 756-6770 or clery@calpoly.edu.

- Receive all RSO mail at the end of the academic year that has not been picked up by club officers.

Advisors who do not meet all of the above responsibilities are subject to removal by the club or the university.

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 an RSO 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 who will have signing authority if the primary advisor is unavailable. Co-advisors must also be employees of California Polytechnic State University or its auxiliaries. 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 Purchase Requests. The advisor's digital authorization (in addition to a student officer's digital authorization) signifies that club money is being spent appropriately. The advisor provides an extra security level to protect the integrity of RSO and ASI funds.

FINANCIAL PROCESSES

Recognized Student Organization Accounts

Recognized Student Organization funds shall be held in trust by the campus through ASI unless granted a specific exception by the University Controller. ASI works with SESLOC to maintain club accounts. University policy requires that clubs deposit all funds to their ASI-managed account. This policy ensures the integrity of the funds from year to year.

ICUAM 3141.01 Administration of Student Organization Funds requires each student organization holding an on-campus bank account to have a current signed agreement on file authorizing ASI to make expenditures on the organization's

behalf. During the annual RSO registration process, the club president, treasurer, and advisor must sign this agreement as one of the registration activities.

ASI Club Services processes financial statements, deposits, donations, and all purchase requests.

Clubs that 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

General RSO deposits can be made in person at the SESLOC branch on the first floor of the University Union, next to the Starbucks pick-up window. This location is the only SESLOC branch that can accept club deposits. A digital club deposit slip is available inside the branch with a SESLOC member services representative to assist you.

RSO donation deposits must be made in person at the ASI Club Services desk on the second floor of the University Union (Building 65), Room 203. Please have your Cash Securities Form completed and signed by the club's advisor before approaching the desk. For more information, contact ASI Club Services at asiclubservices@calpoly.edu or (805) 756-5807. 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 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

When preparing club deposits, cash and checks must be documented and accountable. Deposits should be validated, and cash and checks must be securely 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).

It will take 5-7 business days for any RSO deposits to show up on the RSO's transaction report and in their Cal Poly Now account.

Note: All checks should be made payable to **ASI-Cal Poly Clubs** as the payee with the club's 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 and sign it over to ASI-Cal Poly Clubs prior to making the deposit.

Endorsement should be:

'Club Name'

For deposit only to ASI-Cal Poly Clubs

Checks made payable to California Polytechnic State University, or any department will require an endorsement from the university. In this case, please contact ASI Club Services for assistance.

Deposit donations at the ASI Club Services desk on the second floor of the University Union (Building 65), Room 203. Depositors are required to stay with the teller during the entire deposit process.

Physical Security

All cash and checks should always be physically protected from loss by locking them in a secure receptacle. If the RSO is depositing large sums of money (e.g., over \$2,000), it is highly recommended that two officers accompany the deposit for security reasons. Cal Poly 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's 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 or the maximum valid duration of the check, whichever is shorter.
- 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 located in the University Union (Building 65), Room 212 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 because of the returned check, the fees will be reimbursed once collection has occurred. SESLOC 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 SESLOC 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 SESLOC Bank for processing.

PayPal Buttons

RSOs interested in accepting credit card payments for non-donation and non-sales transactions will be required to utilize PayPal. To receive a PayPal button, please submit a PayPal Button Request Form on Cal Poly Now. All requests to receive a PayPal button must be submitted 14 days in advance to allow for processing.

PayPal Buttons can be created for:

- RSO Dues
- Event Registration
- Membership Fees

PayPal cannot be used to sell merchandise or collect donations. PayPal imposes a fee for this service (1.99% + \$0.49 per transaction as of August 2, 2021), and this fee will be passed on to the RSO.

PayPal buttons are created by ASI for exclusive use on Cal Poly Now. Copying or republishing PayPal button code for use elsewhere is not permitted.

Eventbrite

Cal Poly Clubs & Organizations authorizes the use of Eventbrite by student organizations as a means of selling tickets to events. Payments from Eventbrite must be issued as a check payable to ASI– Cal Poly Clubs. Include the club's name on the memo line or in attached documentation.

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 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 in 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. It is recommended that you plan well in advance for support requests from campus departments as it can take more than 30 days for the invoice to be paid, and the funds credited to your club account.

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

Withdrawing Funds from an Account – Purchase Requests

RSOs may use RSO funds to pay invoices and reimburse members by filling out a Purchase Request. A Purchase Request 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 advisor and officer review. The officer's review must be different than the payee. If the Purchase Request is submitted with all required information, approvals, and supporting documentation, the payment will be processed within five-to-seven business days.

PURCHASE REQUEST GUIDELINES

- Purchase Requests will be processed via Cal Poly Now. Start a Purchase Request via your Finance Tool in Cal Poly Now.
- 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. event policies or club travel).
- Prepaid credit cards or gift cards purchased from 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 approve Purchase Requests to reimburse themselves. Another officer with financial authorization must approve the Purchase Request to align with good accounting practices.
- The following information must be included on all Purchase Request'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 email address (if applicable).
- The payee listed on the back-up documentation must match the name of the payee on the Purchase Request. Reimbursements can only be made to the person that paid for the expenses. If the payee listed on the Purchase Request 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 payment's circumstances. Advisors can add an Advisor Memo in the comments section of the Purchase Request.
- 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 email address on all Purchase Requests. If an email address is not provided, and cannot be confirmed by ASI Club Services, the Purchase Request will be returned.
- Please note that if your club has received ASI Club Funding or College Club Council Funding, any eligible payments processed through a Purchase Request will utilize those funds first until they are fully allocated.
- The PRF includes an additional question pertaining to 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](#) must be attached to the Purchase Request 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 the backup documentation shows that merchandise using the Cal Poly name, logo, or any marks has been purchased and an approved Trademark Licensing Request Form is not attached, the Purchase Request will not be processed and will be denied.

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.

PURCHASE REQUEST BACK-UP DOCUMENTATION

Every Purchase Request 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 Purchase Request 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 Purchase Request.

- 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 the total amount paid or show a \$0.00 balance due.
- Electronic Payments (e.g., Venmo, CashApp, Apply Pay, Zelle, etc.)
 - can only be used to pay a vendor for a tangible item or service
 - itemized invoice must be included
 - W-9 must be provided for new vendors

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. 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 Purchase Request along with the original illegible receipt.

PURCHASE REQUESTS FOR INVOICES

When paying a company directly based on an invoice, an original invoice from the company must be submitted with your Purchase Request, detailing:

- Company name and contact information
- Invoice date
- Item(s) and/or service(s) purchased
- 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, they 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 (5) 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 Purchase Request for submission.

PURCHASE REQUESTS FOR CONTRACTS

A contract is required for any off-campus space rental, including storage units. When paying based on a contract, an approved contract must be submitted with your Club Purchase Request, detailing:

- Payee contact information
- Item(s) and/or service(s) being purchased
- Payment terms as specified in the contract
- 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.)

PURCHASE REQUESTS FOR SCHOLARSHIPS

When paying a Cal Poly student a scholarship, the Purchase Request must be completed to include:

- The payee listed as CPSU Financial Aid
- The Recipient's Employee ID # (EMPL)
- 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 Purchase Request to ASI Club Services. ASI Club Services will check the Purchase Request for completeness. If complete, the Purchase Request 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 to the recipient.

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

PURCHASE REQUESTS FOR AWARDS

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

- Complete the Purchase Request, making it payable to (Payee Name) the recipient receiving the award.
- Provide a completed IRS Form W-9 for the award recipient
- Attach an Advisor Memo from the RSO advisor explaining the award

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.

PURCHASE REQUESTS FOR DONATING FUNDS

RSO funds can be donated to nonprofit organizations of the club's choosing. To do so, complete a Purchase Request. 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 W-9 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.

PURCHASE REQUESTS FOR ASI CLUB SERVICES P-CARD USE

Club purchases of \$500 or more may qualify for the ASI Club Services Procurement Card (P-Card). Please note that due to coordination for the use, requests must be submitted seven (7) business days in advance. Contact ASI Club Services before submitting the purchase request in Cal Poly Now to obtain a P-Card Authorization Number and to coordinate the purchase.

PURCHASE REQUESTS 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 Purchase Request. 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 W-9 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.

PURCHASE REQUESTS FOR TRANSFERS

Funds can be transferred from one club's account to another by completing a Purchase Request. In the description, include an explanation of why the transfer is necessary. Under Payee Information, 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 street address section. Under Payment Method, select "Transfer (between clubs only)."

Back-up documentation for a transfer must include an 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. For state charges, the club will be asked for their chartfield string; for ASI and Cal Poly Partners, the club will be asked for their ASI account number. Please contact ASI for assistance to ensure you are providing accurate information. 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 (5) 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, treasurer, and advisor with the charge amount and a description of the charge. It is the club's responsibility to respond to ASI Club Services if the charges are not approved. If a response is not received within five (5) 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 club's Accounts page on Cal Poly Now as well as on a Transaction Report, which is 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 August 2024, 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 8.75%.

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 are published by the [California State Board of Equalization](#).

Avoiding Delays

PROCESSING DELAYS

Incomplete form submissions may cause processing delays. ASI Club Services attempts to minimize these situations by reviewing documents when received. However, if incomplete paperwork is submitted that will cause a processing delay, the submitting club officer and/or advisor will be contacted via Cal Poly Now and in some instances via email. For quick fixes, the form will be held with ASI Club Services until the corrected information is received. In some cases, the form will be returned to the officer review stage and can only be resubmitted once corrected.

DELINQUENT 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 Purchase Requests, 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 will be referred to the Office of Student Rights and Responsibilities (OSRR) and could result in judicial proceedings against the club and its officers.

Financial Statements

ASI Club Services provides transaction reports upon request. Transaction history can also be viewed via the Finance tool in Cal Poly Now.

Gift and Donation Processing

RECEIVING CREDIT CARD DONATIONS

All donations being made via credit card must be processed through the [Cal Poly Giving](#) or [Spur Change](#).

Follow these directions to use the Cal Poly Giving website

- 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 5% 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](#). 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.

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.

Please Note: Donor intent must be considered when using donated funds. If a donor provides direction for how the funds should be used, it is important to honor this request. ASI Club Services works in collaboration with the University Development and Alumni Engagement office to review these donations and corresponding expenses.

If your RSO is affiliated with a college, you may also contact your College Development Office for guidance. Visit the contact page for [Cal Poly Giving](#), and 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](#). 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](#). 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 before 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.
- 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](#).

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 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.

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.

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 registered 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

Currently registered Cal Poly RSOs with an on-campus account managed by ASI 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 (e.g. Club Sports), 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.

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 each year for ASI Club Funding through the budget request process in Cal Poly Now. Clubs can apply for ASI Club Sponsorship once per quarter with an annual maximum allocation of \$450. Example: A club applied for \$300 in Club Sponsorship funds in fall quarter but realized in spring quarter that they need additional funds to support their activities. The club can apply for an additional \$150 in spring quarter, exhausting their access to Club Sponsorship funding for the year. Applications will be reviewed in the order received and will be approved until allocated funding is depleted.

Clubs must submit payment requests that will utilize ASI Club Sponsorship funds in the same quarter that the expense occurred. Example: A club purchased pizza for a club meeting in October and the club member paid out of pocket. To be reimbursed using ASI Club Sponsorship funding, the club must submit the purchase request in Cal Poly Now by the last day of fall quarter. Note: Submitting the request means that the officer and advisor have both approved the request and it has been moved to ASI Club Services Review stage for processing. All ASI Club Sponsorship 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. This means that all payment requests for spring quarter expenses utilizing ASI Club Sponsorship Funding must be submitted, reviewed by both officer and advisor, and moved to the ASI Club Services review stage by the deadline (Friday of week 9, spring quarter). Additionally, to be an eligible expense any items paid for from these funds must be received by the reconciliation deadline. Purchase Orders (PO's) cannot be used to encumber the funds to be paid at a later date.

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.

The RSO treasurer or other authorized financial officer must meet with ASI Club Services staff no later than seven (7) days before the event. Failure to attend a financial conference will result in the funding being revoked and funds removed from the club account.

A completed RSO Payment Request with appropriate back-up documentation must be submitted through Cal Poly Now to access funds. RSO Payment Requests must be received by ASI Club Services no later than 2 weeks after the event. A one-week extension may be granted upon written request to ASI Club Services. Unused funds will be returned to the ASI Club Funding Reserve. Late RSO Payment Requests will not be reimbursed utilizing ASI Club Event Co-Sponsorship funds. Please note that to be considered "received" by ASI Club Services, Payment Requests must be submitted, reviewed by both officer and advisor, and moved to the ASI Club Services review stage by the deadline.

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

ASI Club Sports Funding is available for currently recognized club sport teams 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 member-organization 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 registered 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.

A completed RSO Payment Request with appropriate back-up documentation must be submitted through Cal Poly Now to access funds. RSO Payment Requests must be received by ASI Club Services no later than 2 weeks after the event. A one-week extension may be granted upon written request to ASI Club Services. Unused funds will be returned to the ASI Club Funding Reserve. Late RSO Payment Requests will not be reimbursed utilizing ASI College Club Council Event Co-Sponsorship funds. Please note that to be considered “received” by ASI Club Services, Payment Requests must be submitted, reviewed by both officer and advisor, and moved to the ASI Club Services review stage by the deadline.

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 by the deadline listed on the [Clubs Banking 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 RSOC will be subject to an immediate revocation of this exception.

Organizations that bank off-campus are not eligible to apply for ASI Club Funding.

CONTACT INFORMATION

ASI Club Services

805.756.5807 // asiclubservices@calpoly.edu

ASI Facility Scheduling

805.756.7587 // asieplan@calpoly.edu

Clubs & Organizations

805.756.0648 // clubs@calpoly.edu