

CAL POLY

Student Affairs  
*Dean of Students*

# CLUBS & ORGANIZATIONS

A guide to understanding policies  
and identifying resources for recognized student  
clubs and student organizations



# Table of Contents

INTRODUCTION .....	5
TYPES OF RECOGNIZED STUDENT ORGANIZATIONS.....	5
<i>Clubs</i> .....	5
<i>Club Councils</i> .....	5
<i>USOs</i> .....	6
PRINCIPLES OF COMMUNITY .....	6
DIVERSITY .....	6
MEMBERSHIP.....	6
<i>Membership Development</i> .....	6
FREEDOM OF EXPRESSION AND THE CAMPUS COMMUNITY.....	6
RECOGNIZED STUDENT ORGANIZATION CODE OF CONDUCT (RSOCC) .....	7
<i>Member Responsibilities</i> .....	8
<i>Application of This Code</i> .....	8
<i>Interim Sanctions</i> .....	8
<i>Procedure</i> .....	8
<i>Unacceptable Student Organization/Member Misconduct</i> .....	9
<i>Sanctions</i> .....	12
<i>Sexual Misconduct</i> .....	12
<i>Where to Report</i> .....	14
<i>Medical &amp; Counseling Services</i> .....	14
<i>Support Resources &amp; Interim Remedies</i> .....	15
<i>Confidential Resources for Complainants and Respondents</i> .....	15
<i>Recognition Reinstatement</i> .....	15
<i>Equal Access</i> .....	15
EVENTS .....	16
<i>Risk Assessment</i> .....	16
<i>Club Contracting for Services</i> .....	16
<i>E-Plans</i> .....	16
<i>Food Policy</i> .....	18
<i>Alcohol at Club Events</i> .....	19
<i>Amplified Sound Policy</i> .....	20
<i>Sponsoring a Sporting Activity</i> .....	20
<i>Income Producing and Fundraising Activities</i> .....	20
<i>Raffles and Giveaways</i> .....	20
<i>Insurance and Liability</i> .....	20
<i>Off-Campus Activities</i> .....	21
<i>If a Problem or Emergency Arises</i> .....	21
PROMOTIONS AND COMMUNICATIONS.....	22
<i>Online Directory</i> .....	22
<i>Email Account</i> .....	22
<i>Prohibited Commercial Use</i> .....	22
<i>Mail</i> .....	22
<i>Mail Services</i> .....	22

Mailboxes .....	22
Use of Cal Poly Name and Symbol .....	23
Eventbrite .....	23
Posting or Distributing Flyers, Posters, and Banners .....	23
Sandwich Boards .....	24
Sandwich Boards for Recurring Events .....	24
Banners in the University Union (UU) Plaza .....	24
Staked Temporary Signs .....	24
Distributing Materials on Campus .....	25
RECOGNIZED STUDENT ORGANIZATION RECOGNITION PROCESS .....	25
Benefits of Official Recognition .....	25
Starting a New RSO .....	26
Renewing a Club Charter .....	26
Online Training .....	27
Roster .....	27
Insurance for Social Fraternity & Sorority Life Organizations .....	27
Updating Bylaws .....	28
Changing RSO's Name .....	28
Inactive RSOs .....	28
Adding an Additional Officer(s)/Advisor(s) to an Existing Charter .....	28
Replacing an Officer(s)/Advisor(s) on an Existing Charter .....	29
Removing an Officer(s)/Advisor(s) from an Existing Charter .....	30
ADVISORS .....	30
RSO Responsibilities to Their Advisor(s) .....	30
RSO Responsibilities .....	30
Advisor Responsibilities to the RSO .....	30
Advisor Responsibilities .....	30
Advisor Indemnification .....	31
Co-Advisors .....	32
Words of Wisdom for Advisors .....	32
FINANCIAL PROCESSES .....	32
RSO Accounts .....	32
Depositing Funds into a Club Account .....	32
Separation of Duties .....	32
Preparing Deposits .....	33
Physical Security .....	33
Depositing Checks .....	33
Returned Checks .....	33
Availability of Funds .....	34
Credit Card Transactions (Non-Donation Related) .....	34
Obtaining Funds from a State Department or Entity .....	34
Withdrawing Funds from an Account – Club Payment Request Form (PRF) .....	34
Charging Privileges .....	39
Sales Tax .....	40
Avoiding Delays .....	40
Financial Statements .....	41
Gift and Donation Processing .....	41
Terms of Funding .....	45

<i>Bank Account Exceptions</i> .....	46
CONTACT INFORMATION .....	47
<i>ASI Club Services</i> .....	47
<i>ASI Facility Reservations (E-Plan Assistance)</i> .....	47
<i>Dean of Students Office, Clubs &amp; Organizations</i> .....	47

# Introduction

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

If you have any questions or would like further information on a specific topic, please contact ASI or the Dean of Students Office. ASI is located on the second floor of the University Union Room 203. The Dean of Students Office, Clubs and Organizations, is located on the second floor of the University Union Room 217.

Contents in this handbook are reviewed and approved by the Dean of Students Office and Associated Students, Inc. (ASI). The contents of this handbook are subject to change.

## Types of Recognized Student Organizations

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

### Clubs

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

### Club Councils

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

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

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

- The RSO has been designated by the Dean of Students Office as being a member organization of the council.

An RSO is affiliated with a college if:

- It is recognized as being “academic”, “honor”, or “professional”
- It has been designated by the Dean of Students Office as being a member organization of the council

---

<sup>1</sup> Campus Administrative Policies: <https://policy.calpoly.edu/>

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

## USOs

University Sponsored Organizations (USOs) are student organizations that are affiliated with a national scholastic honor society.

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

## Principles of Community

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

## Diversity

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

## Membership

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

## Membership Development

Joining a recognized student organization should be a positive experience; therefore, membership development should focus upon 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 and Procedures.)

## Freedom of Expression and the Campus Community

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

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

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

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

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

## Recognized Student Organization Code of Conduct (RSOCC)

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

In accordance with California State University (CSU) Executive Order 1068, Cal Poly's president has the responsibility for implementing campus policies, procedures, and/or guidelines for student organizations and activities. This Recognized Student Organization Code of Conduct (RSOCC) is in compliance with [EO 1068](#)<sup>2</sup> and sets forth the Code of Conduct for Cal Poly Recognized Student Organizations (RSOs). All campus RSOs are subject to this Code of Conduct.<sup>3</sup>

---

<sup>2</sup> Executive Order 1068: <http://www.calstate.edu/eo/EO-1068.pdf>

<sup>3</sup> This RSOCC complies with all student organization requirements described in Title 5, California Code of Regulations, Sections 41500 (Withholding Recognition), 41501 (Definition of Recognition), 41503 (Filing Requisites), and 41504 (Penalties); CSU Executive Orders 868 and 966 regarding Alcohol; CSU Executive Order 1068 (Student Activities); Cal Poly Policy on Alcohol, 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, the Dean of Students, and the Student Conduct Administrator.

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

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

## **Member Responsibilities**

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

## **Application of This Code**

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

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

Sanctions for the conduct listed below may be imposed on student organizations found responsible for violating this RSOCC. 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, sexual misconduct, illegal alcohol or drug activity, or an ongoing pattern of serious violations. Interim sanctions may include a temporary suspension of official recognition and/or restrictions on specific activities including, but not limited to, social probation, participation in campus events, hosting activities, conducting meetings and recruiting members. Interim sanctions may remain in effect until a final sanctions decision has been reached, including any appropriate appeals process, at the discretion of the Dean of Students or designee.

## **Procedure**

OSRR has responsibility for handling all allegations of RSO misconduct on behalf of the University. When OSRR receives a report or information about a student organization's alleged misconduct, an

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

During the informal conference, the Student Conduct Administrator will meet with the president or chair of the RSO to discuss the allegations and charges, as well as the proposed sanctions. The RSO president or chair may have one advisor of their choice. The RSO charged may elect to be accompanied by an advisor of their choice to a meeting, interview, or hearing regarding the allegations, subject to the same limitations set forth in Executive Order 1098 Article II. C (pertaining to individual student conduct proceedings). The advisor may not answer questions regarding the subject matter of the proceedings for the RSO charged. Where attorneys are permitted, the RSO charged may elect an attorney as an advisor. However, an advisor is limited to observing and consulting with, and providing support to, the RSO. RSO Code of Conduct matters are not legal processes and attorneys may not participate directly in the process. If the RSO is found responsible for misconduct by the Student Conduct Administrator, the Student Conduct Administrator will issue a written notice to the RSO president or chair setting forth the final charges and related sanctions. The RSO president or chair will accept the sanction(s) on behalf of the RSO.

## **Unacceptable Student Organization/Member Misconduct**

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, lewd, indecent, or obscene behavior at a University related activity, or directed toward a member of the University community.
7. Health & Safety. Conduct that threatens or endangers the health or safety of any person within or related to the University community, including physical abuse, threats, intimidation, harassment, sexual misconduct, throwing bottles or objects that could result in personal injury, or where three or more members of a student organization engage in group violence or taunt others to engage in violence.
8. Hazing and Conspiracy to Haze. Hazing is defined as any method of indoctrination, initiation or preinitiation 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's Alcohol Policy](#)<sup>4</sup> regarding on and off campus use, service, sale and consumption for more detailed information.)
11. Theft or Misappropriation of University Resources and Property.
  - a. Theft of property or services from the University community, or misappropriation of University resources. Unauthorized removal of University property from common use areas.
  - b. Possession by the student organization or presence at organization-related activities or facilities of stolen property or University property that has been removed without University authorization.
12. Property Damage. Unauthorized destruction, defacement or damage to University property or other property in the University community, including removal, alteration or damage to University signs or banners.
13. Weapons. Possession, use or misuse of firearms or guns, replicas, ammunition, explosives, fireworks, knives, other weapons, or dangerous chemicals at a University related activity, or at a student organization facility, function or activity.
14. Misuse of Computers. Misuse of University computer facilities or resources, including:
  - a. Unauthorized entry into a file, for any purpose.
  - b. Unauthorized transfer of a file.
  - c. Use of another's identification of password.
  - d. Use of computing facilities, campus network, or other resources to interfere with the work of another member of the University community.

---

<sup>4</sup> Cal Poly's Alcohol Policy: <http://www.osrr.calpoly.edu/alcohol-policy>

- 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 his/her 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 misrepresentations 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. Discrimination. Discrimination in membership policies on the basis of race, religion, national origin, ethnicity, color, age, gender, marital status, citizenship, sexual orientation, gender identity or expression, or disability (the prohibition on membership policies that discriminate on the basis of gender does not apply to social fraternities or sororities or to other university living groups).
  23. Student Organization Events.
    - a. Failure to comply with event approval conditions imposed by the Office of Dean of Students or other University offices.
    - b. Failure to comply with the policies governing student organization events held on campus or funded by the University or a University auxiliary organization.
    - c. Failure by a fraternity or sorority to comply with the Party Registration Policy.
  24. Use of Cal Poly name and logo. Unauthorized use of California Polytechnic State University or Cal Poly name, logo or symbols, or use not in compliance with University policies and authorization.

## Sanctions

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

1. Withdrawal of recognition – includes but is not limited to the student organization being denied use of University facilities, use of the University name, and use of Associated Student facilities and services. Withdrawal of recognition may be permanent, indefinite or for a specified time.
2. Suspension – suspends all privileges granted to the student organization for a specific time. An organization under suspension must continue to fulfill 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 of 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.
10. Social restrictions – prohibits the student organization from holding social events for a specific period.
11. Alcohol restrictions – prohibits the student organization from having alcoholic beverages present at organization-related activities.
12. 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.
13. Fines – requires the student organization to pay fines not to exceed \$1000, to be used for educational or charitable purposes or to be paid directly to a charitable organization or a designated University or Associated Students program.

## Sexual Misconduct

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

If you are a student, your rights are covered in Executive Order 1097:  
<https://www.calstate.edu/eo/EO-1097-rev-10-5-16.pdf>

If you are an employee or third party, your rights are covered in Executive Order 1096:  
<https://www.calstate.edu/eo/EO-1096-rev-10-5-16.pdf>

Also, Executive Order 1095 contains general information:  
<https://www.calstate.edu/eo/EO-1095-rev-6-23-15.pdf>

### **Affirmative Consent & Capacity**

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

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

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

The use of alcohol or drugs does not make the complainant at fault for sexual misconduct. A complainant should not be deterred from reporting incidents of sexual misconduct out of a concern that there might be disciplinary charges for related violations of drug, alcohol, or other university policies. Except in extreme circumstances, complainants in sexual misconduct charges shall not be subject to discipline for related violations of the Standards for Student Conduct. Please note, this information above is summarized from the applicable policies, linked above. To view the full text, please refer to Executive Order 1097 at

<https://www.calstate.edu/eo/EO-1097-rev-10-5-16.pdf> and Executive Order 1096 at <https://www.calstate.edu/eo/EO-1096-rev-10-5-16.pdf>

Also, Executive Order 1095 contains general information:

<https://www.calstate.edu/eo/EO-1095-rev-6-23-15.pdf>

[How Do I File a Complaint?](#)

All of the policies above contain complaint forms that may be filled out and filed with the Office of Equal Opportunity and/or Title IX Coordinator, as appropriate: Completing a form is *not necessary* but it is an option. Complaints can also be taken verbally during an intake meeting with the Office of Equal Opportunity: <http://equalopportunity.calpoly.edu/content/title-ix>

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

Under the Executive Orders and mandatory reporting requirements set forth in state and federal laws, **employees** of Cal Poly, unless designated as confidential resources (i.e., hold medical licenses or work in medical offices or who have confidential resource certifications per Executive Order 1095) **are mandatory reporters.**

## Where to Report

### Title IX Coordinator and Deputy Title IX Coordinators

Brian Gndt, Title IX Coordinator

Phone: 805.756.1400 or email: [bgnandt@calpoly.edu](mailto:bgnandt@calpoly.edu)

Location: Administration Bldg. 33-290

Tera Bisbee, Deputy Title IX Coordinator

Phone: 805.756.5237 or email: [tbisbee@calpoly.edu](mailto:tbisbee@calpoly.edu)

Location: Building 01-311

Deputy Title IX Coordinator for Athletics

Barbara Martinez, Compliance Official for Athletics

Phone: 805.756.5075 or [bmartine@calpoly.edu](mailto:bmartine@calpoly.edu)

### Cal Poly University Police

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

### On-Campus Off-the-Record/Unofficial Reporting

Counseling Services at 805.756.2511; <https://hcs.calpoly.edu/counseling>

Cal Poly Safer at 805.756.2282; [safer.calpoly.edu](http://safer.calpoly.edu)

### Local Police

San Luis Obispo Police

Emergency: Dial 911; Non-Emergency Police Services: 805.781.7317

Address: 1042 Walnut at Santa Rosa, San Luis Obispo, CA

## Medical & Counseling Services

### Cal Poly Health Center

Phone including after hours: 805.756.1211

Hearing or Speech Impaired: Call 711 (Telecommunications Relay Service)

Location: Building 27 (next to the Campus Recreation Center)

Website: <http://www.hcs.calpoly.edu>; Email: [health-counseling@calpoly.edu](mailto:health-counseling@calpoly.edu)  
Main Phone including after hours: 805.756.1211

## Cal Poly Counseling Center

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

## Support Resources & Interim Remedies

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

## Confidential Resources for Complainants and Respondents

**Cal Poly Counseling Center**  
<https://hcs.calpoly.edu/counseling805.756.2511>

**Cal Poly Safer (On Campus)**  
[safer.calpoly.edu](http://safer.calpoly.edu)  
805.756.2282

**Respect | Inspire | Support | Empower (RISE – 24/7 services)**  
<http://www.riseslo.org/>  
855.886.7473

## Recognition Reinstatement

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

## Equal Access

Cal Poly RSOs shall not discriminate either in the content of bylaws or in practice against any person on the basis of age, disability, gender, gender identity, genetic information, nationality, race or ethnicity, religion, sexual orientation, citizenship or veteran status.<sup>5</sup>

The prohibition on membership policies that discriminate on the basis of gender does not apply to social fraternities or sororities.

---

<sup>5</sup> CSU Executive Order 1068 and Title 5 of the California Code of Regulations, Section 41500, et seq.

# Events

RSOs are responsible for their own events and activities. The following information is provided so that they may plan events that are safe and successful.

## Risk Assessment

The Dean of Students Office and ASI's goal is to assist student groups in having successful events in a safe environment. The following information is provided so that clubs may plan events that are safe and successful.

## 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 University advisor. It is the responsibility of the club and club officers to facilitate this review.

Clubs and organizations hosting on-campus events that require a contract are required to submit a copy of the contract to the university for review prior to as a prerequisite for the approval process.

The University's general liability insurance does not provide coverage to RSOs and their members for their events and activities, whether on or off-campus, whether registered through the E-Plan process or not. Clubs and organizations who are not covered under the CSU policy (Club Sports) or a national sponsoring organization (i.e Greek Life, etc. ) will be responsible for obtaining their 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). Clubs can seek financial assistance; see ASI Club Event Insurance Assistance in this handbook.

## E-Plans

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

The E-Plan contains multiple deadlines determined by the event' requirements and location. Some events take more time to plan for than others. An event may require 3 busines days, 7days, or 14 days based on event needs.

## Event Timeline Requirements

### 3 Business Days

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

- General meetings (2 hrs. or less) - Classrooms or UU Conference Rooms

- Sandwich Boards or Tri-fold Displays - Information Tables or Booths (campus wide)
- Events involving:
  - Amplified sound or music
  - Parking permits
  - Renting equipment
  - Chalking (campus wide)

### **7 Calendar Days**

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

- On-campus events and meetings (any length of time)
- Events involving:
  - Food or drink
  - Sale of merchandise
  - Amplified sound/music
  - Chalking
  - Renting equipment
  - Showing a film/video
  - Use of Cal Poly names, symbols or marks

### **14 Calendar Days**

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

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

### **Initiating the E-Plan**

The E-Plan can be found on the [E-Plans<sup>6</sup>](#) section of the Cal Poly clubs and organizations website. After selecting "E-Plans," the club member will be directed to the Cal Poly portal to authenticate their signature. Once authenticated, they will be routed to the E-Plan. To start a new E-Plan, select "Create a New E-Plan."

---

<sup>6</sup> E-Plans: <https://clubs.calpoly.edu/events/e-plans>

## Obtain Required Approvals

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

- Once the president has approved the E-Plan, a notification will be electronically sent to the advisor requesting approval. The purpose of the advisor's approval is to keep them informed about club event details. Once the advisor has approved the E-Plan, ASI Facility Scheduling will process the request. Final approval may take several weeks.
- Note: The RSO president and/or advisor must approve the E-Plan prior to the specified deadline. If the E-Plan is not approved within the deadline, it will not be processed and a new E-Plan will need to be submitted with alternative event dates. Although some requests require shorter deadlines, it is highly recommended to plan ahead.

## Checking the Status of an E-Plan

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

### Status: Pending President's Approval

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

### Status: Pending Advisor's Approval

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

### Status: Sent to ASI Facility Scheduling

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

### Status: Pending Campus Approvals

When three status bars have been filled, the ASI Facility Scheduling staff has entered the E-Plan into the facility scheduling system, however they are waiting for confirmation from other on-campus entities (e.g., Campus 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 the event may go forward, and all requirements have been met and arranged.

### Status: Denied

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

## Food Policy

For most events held on campus where food will be available, the food must be ordered from University Catering or an approved caterer. A current list of university approved caterers can be found on [Administration & Finance-Procurement Services](https://afd.calpoly.edu/cprm/procurement/catering/approved-caterers).<sup>7</sup> If an RSO wishes to use an off-campus caterer, contact University Catering for a list of approved caterers. In addition, an application and orientation provided

---

<sup>7</sup> Administration & Finance-Procurement Services: <https://afd.calpoly.edu/cprm/procurement/catering/approved-caterers>

by Environmental Health and Safety may be required. Events involving food must have an E-Plan on file. When the E-Plan is initiated, ASI Club Services will provide the RSO with contact information for both departments and will notify the RSO of the pending event.

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

For further information about campus food policies, visit [University Catering](#).<sup>8</sup>

## Food Safety

All events on campus involving food must follow the [Campus Food Services Policy](#).<sup>9</sup>

## Alcohol at Club Events

Alcoholic beverages are not to be served at off-campus functions by officially recognized Cal Poly Clubs except when private service (i.e., for members and guests) is arranged by contract with a properly licensed third-party vendor or when hosted at a registered chapter facility by a Fraternity or Sorority recognized by Cal Poly. Club members may not serve or provide the alcohol themselves. Individuals at the club 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 Party Registration Policy. The facility or caterer must have a valid Alcohol Beverage Control (ABC) license in order for the event to be approved. If a club is hosting an event at a location that does not already provide alcohol and an outside entity is hired to serve alcohol, the following is required:

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

In addition, each event must provide for the availability of popular non-alcoholic beverages for those persons less than 21 years of age. Students of legal age while attending an off-campus university approved activity in the vicinity of a public bar may not have their rights denied except by representatives of the licensee or by civil law enforcement authorities for cause. If alcohol is available at an off-campus event, it must be noted on the E-Plan. In addition, any event involving alcohol at an off campus location may require a meeting with The Dean of Students Office prior to the event taking place. If a meeting is necessary, a representative from The Dean of Students 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 companies that sell alcohol). For more information on alcohol at off-campus events, please refer to the [Office of Student Rights & Responsibilities](#).<sup>10</sup>

---

<sup>8</sup> University Catering: <https://calpolydining.com/catering/>

<sup>9</sup> Campus Food Services Policy: <http://www.afd.calpoly.edu/ehs/foodsafety.asp>

<sup>10</sup> Office of Student Rights & Responsibilities: <http://www.osrr.calpoly.edu>

(See [Cal Poly's Alcohol Policy](#)<sup>4</sup> regarding on and off campus use, service, sale and consumption for more detailed information. See also, Cal Poly's Fraternity and Sorority Life Party Registration Policy regarding registration of off-campus events where alcohol is present for more detailed information.)

## Amplified Sound Policy

Outdoor events and activities that involve amplified music or speech are limited to the hours of 7 a.m. to 10 p.m. All such events or activities must be scheduled by an RSO through the E-Plan process and comply with any additional guidelines pertinent to a particular venue. Refer to [Campus Administrative Policy \(CAP\) 140](#).<sup>11</sup> for more details about the campus-wide amplified sound policy.

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

## Sponsoring a Sporting Activity

RSOs intending to sponsor a competitive sporting activity must submit a description of the activity and number of participants via the E-Plan process. The Dean of Students Office is responsible for providing guidance and approval for sporting activities. The Kinesiology and Athletics offices approve use of a requested sports facility, but ASI determines sporting activity needs. All individuals participating in sporting events must complete a University Activity Release Agreement to be submitted to Office of the Dean of Students.

## Income Producing and Fundraising Activities

The Cal Poly Bookstore Director or designee must approve campus sale of goods that might be similar to merchandise available in the Bookstore.

## 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

### Release of Liability Form

RSOs are responsible for their own activities and assume complete responsibility and liability for their activities. ASI and the University do not provide liability/accident/medical insurance for RSOs and RSO members. RSOs may purchase their own liability insurance or special events insurance through the University's third party provider. If an individual is injured or causes personal or property damages or other injuries at an RSO event, that individual is personally responsible for any related expenses and damages. When RSOs sponsor on campus activities with the potential for injuries and/or damages, participants are required to complete a Release of Liability, Promise Not to Sue, Assumption of Risk and Agreement to Pay Claims form. (University Release Agreement 22 form aka Release of Liability Form.)

---

<sup>11</sup> Campus Administrative Policy (CAP) 140 et seq: <http://policy.calpoly.edu/cap/100/cap140.htm>

The Release of Liability form serves two important purposes: it notifies the participant that liability/accident/medical insurance is not provided for the activity and it clarifies the responsibility of the individual, the university, and the RSO. Release of Liability forms can be filled out at the event site but must be completed prior to the individual participating in the activity.

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

### **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.

### **Off-Campus Activities**

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

### **Open Bodies of Water**

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

### **Ineligible Off-Campus Events and Activities**

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

### **Student Travel**

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

Club travel request forms are only required for Club Sport teams and clubs using university vehicles. Travel forms must be completed and submitted to ASI Club Services a minimum of 14 days prior to travel.

### **Suggested Procedure for Incidents During Travel**

Should an incident or injury occur during travel, an incident report is suggested to be filled out and submitted to the Dean of Students Office upon return to campus so that the University can offer support and resources for students.

### **If a Problem or Emergency Arises**

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

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

# Promotions and Communications

## Online Directory

The RSO Directory is an online database of all recognized Cal Poly RSOs. This directory includes information gathered from each group's current Charter, including contact information for the president and advisor, links to club web pages, and a brief description of the RSO.

## Email Account

Upon request, RSOs are given one email account and one entry in the campus directory server that redirects your messages to the email account. To set up these services, print the [Request for a Cal Poly Email form](#) found on the [Running a Club](#)<sup>12</sup> section of the Clubs and Organizations website. Once the form is filled out and the proper signatures are obtained, submit it to ASI Club Services. This information will be forwarded to Cal Poly Information Technology Services, who will then contact the RSO representative with further information.

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

## Prohibited Commercial Use

- Displaying personal items for sale on a web page residing on or transmitted through University resources.
- Displaying commercial advertisements on a web page hosted on University resources.
- Using a Cal Poly account to create and host a website for a local organization promoting fundraisers and other commercial activities.
- Using a Cal Poly account to operate or conduct non-University related business activities, including financial management, advertising and promotion, correspondence, websites, etc.

## Mail

### Mail Services

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

### Mailboxes

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

RSO Name, Mailbox #  
ASI Club Services  
1 Grand Avenue

---

<sup>6</sup> Clubs and Organizations: <https://clubs.calpoly.edu/email-webpage-request>

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

## Use of Cal Poly Name and Symbol

Use of the University's name is a privilege reserved by law to the University and organizations officially recognized and authorized by the University and may not be used to imply, either directly or indirectly, the University's endorsement, support, favor, association with, or opposition to an organization, product or service without the permission of the University. (See CAP 145.) This includes but is not limited to use of the University name or marks in printed, electronic, or other such media. Unauthorized uses may constitute a violation of state law, trademark and/or copyright infringement.

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

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

The Club Payment Request Form (PRF) includes an additional question regarding the use of Cal Poly marks. If the purchases being paid/reimbursed for on the Club PRF include the use of any Cal Poly marks, it must be indicated on the Club PRF. Use the [Student & Internal Request to Use the Cal Poly Name form](#) found via the [Cal Poly clubs website](#).<sup>13</sup>

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

## Eventbrite

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

Payments from Eventbrite must be issued in the form of a check payable to: [name of RSO] at Cal Poly. Submit payments to ASI Club Services in the University Union, building 65, room 203.

## Posting or Distributing Flyers, Posters, and Banners

The University has a [Campus Administrative Policy \(CAP\) 140](#)<sup>11</sup> regarding posting or distributing flyers, posters, and banners on campus.

---

<sup>13</sup> Request to use Cal Poly Name: <https://clubs.calpoly.edu/calpoly-branding>

## Sandwich Boards

The University has a [Campus Administrative Policy \(CAP\) 140](#)<sup>11</sup> regarding sandwich boards. (See CAP 144.6:.) The E-Plan process must be used to gain approval to set up sandwich boards on University property. The maximum size for a sandwich board is 2'x4'. Sandwich boards cannot be on display for more than seven days prior to an event and must be removed immediately following the event. All spaces for sandwich boards are assigned on a first-come, first-served basis. Sandwich board reservations will be accepted at the following locations on campus: UU Plaza, Dexter Lawn, Via Carta Mall, and Ag Circle. Sandwich boards displayed at other areas on campus will be removed by Cal Poly Facility Services.

## Sandwich Boards for Recurring Events

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

- Maximum size for signs is 2'x4'
- Maximum time is one quarter
- Signs may not be placed on lawns or shrub areas
- Signs may not restrict access to sidewalks or building entrances
- Signs must be maintained by the sponsoring group

## Banners in the University Union (UU) Plaza

The University has a [Campus Administrative Policy \(CAP\) 140](#)<sup>11</sup> regarding banners on campus. (See CAP 144.5 and 144.6:)

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

## Staked Temporary Signs

- See CAP 144.6 for full details regarding the campus policy on temporary signage
- Letter-sized (i.e., 8.5" x 11") signs may be placed on redwood lath stakes
- Signs may not advertise events for longer than one week
- Signs may not pose a safety risk
- Signs may not be taped to, attached to or placed on buildings, trees, cars, traffic signs, posts, or hillsides, or trash cans or on interior doors, windows, walls, floors or ceilings
- Signs may not obstruct entrances or exits of buildings or the line of vision to vehicular or pedestrian traffic
- Signs must clearly identify the name of the RSO sponsoring the activity
- The RSO responsible for placing temporary signage shall be responsible for its removal no more than two weeks after its posting, or if advertising an event, when the event is over
- In order to ensure maintenance of an uncluttered, attractive and safe campus, the University otherwise reserves the right to remove temporary signage (commercial and non-commercial) if it is not in compliance with University Policy, if it has been posted for more than two weeks, or if the event it advertises has taken place, whichever comes first
- Signage may also be removed when damaged, displaced or weather so that it is no longer readable
- Organizations or persons who fail to remove temporary signage in a timely manner may be held responsible for the cost of its removal

- Posting of temporary signage is subject to additional location specific guidelines enumerated in CAP 144.6

## Distributing Materials on Campus

See Cal Poly's Free Expression policy in [Campus Administrative Policy \(CAP\) 140](#)<sup>11</sup> for more details on leafletting on campus.

University Housing will only post flyers for events that have an E-Plan initiated. To have a poster advertising your event displayed in the residence halls, take 10 posters to the Residential Life and Education office, located in Building 31 Room 111, a minimum of seven days prior to the event date.

Due to limited space and fire safety concerns, one flyer per event will be posted in each hall. Posters must be on letter or legal-sized paper only (i.e., no posters will be accepted). All posters will be reviewed by Residential Life and Education for compliance with the policies listed in the Residence Hall Handbook and with CAP 140.

All posters must have the sponsoring club or department name clearly indicated. All posting will be done by residence hall staff. Unapproved flyers will be removed.

## Recognized Student Organization Recognition Process

RSOs shall:

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

## Benefits of Official Recognition

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

## Starting a New RSO

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

RSO: Ensure that no other club currently exists with a similar purpose.

RSO: Find a minimum of eight currently enrolled Cal Poly students that are interested in being a part of the RSO. 100% of the student organization membership shall be matriculated Cal Poly students.

RSO: Find University employee who would be willing to serve as the RSO's advisor.

RSO: Complete a Petition for University Recognition form and Bylaws using the [Bylaw Template](#).

RSO: Submit the Petition for University Recognition form and Bylaws to ASI Club Services for processing.

ASI CLUB SERVICES: Verify necessary documents are submitted.

DEAN OF STUDENTS OFFICE: Contact the potential club contact person to schedule a meeting.

DEAN OF STUDENTS OFFICE: Review bylaws and either approve or deny the process to continue. If denied, the Dean of Students Office will notify the RSO contact.

ASI CLUB SERVICES: Return Bylaws to the RSO for revisions if necessary, or notify the RSO that they are now officially recognized by the University and the officers and advisor(s) can begin online training.

RSO: President, treasurer, and advisor must complete the Online Training.

RSO: Once training is completed, president will receive the Charter via email.

RSO: Complete Charter and get signatures of a minimum of two officers and an advisor and submit to ASI Club Services for processing.

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

## Renewing a Club Charter

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

- The president is responsible for entering all relevant information into the Charter.
- The Charter must be printed, signed by all officers and advisor(s). A minimum of two different officers and one advisor are required.
  - Note: Original wet signatures are required. No scanned, faxed or photocopied signatures will be accepted.
- If the RSO is affiliated with a specific College, the RSO must obtain:

- Information and signature of College Council Representative (an RSO member willing to attend College Council meetings of all RSOs affiliated with that College) and the College Dean's signature
- A Community Service Representative position is listed on the Charter. The responsibility of this position is to organize and manage community service projects for the RSO. Although this position is not mandatory, The Dean of Students Office recommends that this position be filled, allowing the RSO to better assist and promote its service projects.
- Once all signatures are obtained, the Charter must be submitted to ASI Club Services for processing.
  - Note: Failure to obtain the appropriate signatures will result in the Charter being returned to the RSO.
- ASI Club Services will verify completeness and forward the Charter to The Dean of Students Office to check president and treasurer GPA and verify that the advisor is a Cal Poly State University employee.
  - Note: The president and treasurer listed on the Charter must comply with the California State University definition of minor student representative officers provided by Executive Order 969 and
    - ◆ 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 under graduate students, earn at least nine student credit units per quarter while holding office;
    - ◆ 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;
    - ◆ 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.
- ASI Club Services will notify the president via email when the process is complete.

## Online Training

The Online Training can be found on the [Clubs and Organizations](https://clubs.calpoly.edu/)<sup>14</sup> website.

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

## Roster

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

## 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 Fraternity & Sorority Life office.

---

<sup>11</sup> Clubs and Organizations: <https://clubs.calpoly.edu/>

## Updating Bylaws

When an RSO wishes to update their bylaws, new bylaws must be submitted using the Bylaw Template found in [Club Recognition](#)<sup>15</sup> section of the Clubs and Organizations website. A copy of the RSO's current bylaws is available with ASI Club Services, should the RSO need them as a reference.

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

- A typed copy of the RSO's new bylaws.
- An electronic copy of the bylaws in Microsoft Word on CD (not required but if submitted, this CD will be kept on file for future reference).
- A completed [Bylaw Amendment Request form](#). This form can be found in the [Club Recognition](#)<sup>16</sup> section of the Clubs and Organizations website
- Once these items have been submitted, the changes will be reviewed. If approved, the RSO will be notified and the necessary changes will be made to the RSO's file.

## Changing RSO's Name

When changing a RSO name, new bylaws reflecting the name change must be submitted using the Bylaw Template found in the [Club Recognition](#)<sup>17</sup> section of the Clubs and Organizations website. A copy of the RSO's current bylaws is available with ASI Club Services, should the RSO need them as a reference.

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

- A typed copy of the RSO's new bylaws (updated with the RSO's new name).
- An electronic copy of the bylaws in Microsoft Word on CD (not required but if submitted, this CD will be kept on file for future reference).
- A completed [Name Change Request form](#). This form can be found in the [Club Recognition](#)<sup>18</sup> section of the Clubs and Organizations website.
- Once these items have been submitted, the changes will be reviewed. If approved, the RSO will be notified and the necessary changes will be made to the RSO's file.

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

## Inactive RSOs

After two years of inactivity, defined by non-renewal of an RSO Charter, RSO funds will become the property of ASI. If the RSO reactivates, it can petition the ASI Board of Directors for the return of the funds.

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

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

The RSO must notify ASI Club Services so that an Add to Charter form can be sent to the president. Upon receiving the Add to Charter form, the president will need to sign the Charter and also obtain the signature(s) of all the new officer(s)/advisor(s) being added. The only signatures needed are those of the

---

<sup>13</sup> Clubs and Organizations: <https://clubs.calpoly.edu/start-a-club>

new officer(s)/advisor(s) and the president (the current advisor's signature is not required). Submit completed Add to Charter form to ASI Club Services for processing. Once the chartering process is completed, the president will be notified by ASI Club Services by email.

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

Note: RSOs have the ability to add as many officers to their Charter as desired. While the Charter states specific officer titles (e.g., President, Vice President, Secretary), this does not mean that those are the only officer positions an RSO can have on file. To add another officer position with a different title, cross out the officer titles that do not apply and write in the desired officer titles.

## **Replacing an Officer(s)/Advisor(s) on an Existing Charter**

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

### **Option One: New President, Treasurer, and/or Advisor Complete Online Training**

The new president, treasurer, and/or advisor complete the online training on the Clubs and Organizations website (i.e. as described in the Online Training section earlier in this chapter). Once all training requirements are complete, a Replace Charter form will be emailed to the president. Upon receiving the Charter, the president will need to obtain all signatures, including that of the College Dean if the RSO is affiliated with their college. Submit completed Replace Charter form to ASI Club Services for processing. Once the chartering process is completed, the president will be notified by ASI Club Services by email.

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

Note: New officer(s)/advisor(s) will not be able to sign any paperwork until the Charter has been approved by The Dean of Students Office.

### **Option Two: New Officer (i.e. president, treasurer, or advisor) Notifies ASI Club Services**

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

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

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

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

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

## Advisors

### RSO Responsibilities to Their Advisor(s)

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

### RSO Responsibilities

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

### Advisor Responsibilities to the RSO

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

### Advisor Responsibilities

- Be a University representative to the RSO.
  - Learn about pertinent University policies and procedures. Advise RSO officers on adhering to these policies, including those regarding alcohol, contracts, and purchasing.
- Provide continuity from year-to-year during transitional periods.
- Help mediate within the RSO and assist with problems that may arise.
- Act as a role model. Encourage leadership and group development.
- Assist in developing the RSO's short and long-term goals and provide guidance to help the RSO reach those goals.

- Be aware of all RSO activities, be involved with all RSO events, and provide insight and guidance for activity planning.
  - Review and authorize E-Plans. Failure to approve E-Plans within the proper timelines will result in the denial of the request. Review published materials and advertising before they are distributed.
- Review expenditures, support budget planning, and monitor financial records.
  - Carefully review and authorize all RSO PRFs and accompanying original/itemized receipts and invoices. PRFs must have the advisor's signature in order to be processed. If an advisor's signature on a PRF appears different than the signature on the RSO's Charter, payment processing will be delayed until the signature can be verified.
  - Remind RSO officers to request Purchase Orders prior to confirming orders with vendors whenever possible.
- Review all distributed material, publicity, and official correspondence before distribution.
- Review and approve Cash Securities forms, Gift-in-Kind forms, ASI Club Funding applications, and PayPal Button Request forms. Other documents do not require the advisor's approval/signature, but should be reviewed.
- Report disclosed crime information (i.e., Clery Act).
  - The Clery Act is a federal law that mandates crime statistic disclosure, publication of campus security policies, and the posting of a crime log for the university. The Annual Security Report provides alcohol/other drug resources, offers information about sexual assault, and addresses other safety issues affecting our community. The Clery Act also contains a timely warning policy mechanism to ensure that students, staff, and faculty know about serious, on-going threats to safety on campus.
  - Advisors have a mandated reporting responsibility as a Campus Security Authority (CSA). If a student reports or discloses a crime to their advisor, the advisor is expected to submit a report with the University Police Department that containing information about the crime. The student's name and personally identifiable information are not a part of the report. The following are examples of crimes that must be reported:
    - ◆ A student talks to his advisor in confidence about his roommate who recently stole his bicycle.
    - ◆ A student talks to her advisor in confidence about her house being broken into and her laptop being stolen
  - If the advisor becomes aware of a missing or potentially missing person, the advisor must report the incident to the University Police Department immediately. The on-duty Police Dispatcher can be contacted at (805) 756-2281. In the case of an emergency, dial 911. Students can also make anonymous reports of crimes by text (text from a cellphone to [calpoly@tipnow.org](mailto: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](#).<sup>19</sup> Download the [UPD TipNow \(PDF\)](#).<sup>20</sup> For questions regarding the Clery Act or the reporting of crimes at Cal Poly, please [email Fred Mills](mailto:email.Fred.Mills)<sup>21</sup>, Police Records Manager, or call (805) 756-6685.
- Receive all RSO mail at the end of the academic year that has not been picked up by club officers.

## Advisor Indemnification

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

---

<sup>19</sup> Email TipNow: [tipnow@calpoly.edu](mailto:tipnow@calpoly.edu)

<sup>20</sup> UPD TipNow Brochure: <http://afd.calpoly.edu/Police/docs/tipnow.pdf>

<sup>21</sup> Email Fred Mills - [fmills@calpoly.edu](mailto:fmills@calpoly.edu)

## Co-Advisors

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

## Words of Wisdom for Advisors

- An effective advisor allows students to make decisions and learn from their experiences. While it may be an advisor's first reaction to intervene and fix mistakes, this is not the role of an advisor.
- An advisor does not supervise or control RSO activities. The advisor's role is strictly advisory. An advisor should help members benefit from their experience by using mistakes and opportunities as teachable moments. The advisor should be proactive when a potentially controversial or policy-related situation or decision is discussed, while allowing the RSO member to make their own decisions and choices.
- Part of the educational experience students gain in leadership positions is how to manage a budget and maintain fiscal records. The advisor's primary role regarding finances will be to monitor expenses, provide feedback on the budget, and authorize PRFs. The advisor's signature (in addition to a student officer's signature) signifies that club money is being spent appropriately. The advisor provides an extra security level to protect the integrity of RSO funds.

## Financial Processes

### RSO Accounts

All clubs, with the exception of RSOs which have been granted an exception by the University, have a financial account with ASI. ASI works with Chase bank to maintain club accounts. University policy requires that clubs deposit all funds with ASI. The purpose of this policy is to ensure the integrity of the funds from year to year. Financial statements, donations, and all check and purchase order requests are processed by ASI Club Services.

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

### Depositing Funds into a Club Account

To deposit non-donation money into a club account, an officer listed on the current Charter must go directly to the Chase bank branch located on the first floor of the University Union. General members cannot deposit on behalf of the club. Deposits are accepted at Chase Monday – Friday, 9 a.m. – 6 p.m. and Saturday, 9 a.m. – 2p.m., unless otherwise posted. The Cal Poly Chase bank branch is the only Chase bank branch that accepts club deposits.

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

### Separation of Duties

No single person should have complete control over the entire process of receiving funds, preparing the bank deposit, and verifying the deposit. Separation of duties must be maintained when cash is received and processed. Separation of Duties requires that two or more qualified and authorized persons are involved in the process of collecting, handling, depositing, and accounting for all cash/check transactions. The person collecting money, issuing receipts, and preparing the deposit should be someone other than the person verifying the deposit.

## Preparing Deposits

- Accountability for and documentation of cash and checks must be maintained when preparing club deposits. The validation and preparation of deposits should be done in a non-public, safe, and secure location. A report of cash collections signed by the preparer should be kept for the club's records.
- Deposits should be made the same day as collected if possible or as soon as possible if not (i.e., the next business day).
- Deposit slips can be found at the ASI Club Services self-service 'Club Hub' or at the Cal Poly branch of Chase bank and should be completed prior to approaching a bank teller.
- There are two types of deposit slips: Fundraising and General Club Deposit. The fundraising deposit slip allows you to add a description (up to 20 characters) that will appear on a transaction report that officers can request from ASI Club Services. The general deposit slip provides checkboxes for you to select from that best describe your deposit type.
- Amounts should be filled in by denomination and the club's name and account number.
- For cash, place like bills together (i.e., all \$1 bills together, all \$5 bills together, etc.) and roll coins in coin wrappers if appropriate.
- For checks, make copies of all checks for the club's records. Sort checks by dollar amount. Stamp all checks prior to making a deposit. ASI Club Services and Chase bank have an endorsement stamp available for club use.
- Depositors are required to stay with the teller during the entire deposit process. After making a deposit, the club should retain the yellow copy of the deposit slip.

## Physical Security

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

## Depositing Checks

All checks for deposit must have:

- ASI-Cal Poly Clubs as the payee with the club name in the memo line. If the check has been made out to the club, the club officer must endorse the check over to ASI-Cal Poly Clubs prior to making the deposit (See ASI Club Services if you need assistance).
- Not be altered.
- A date within the last six months.
- 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 less corrections, initialed by the signer.

## Returned Checks

If a deposited check is returned from the bank due to insufficient funds (i.e., "bounced"), stop payment, stale check, or any other reason, the ASI Business Office sends a collection letter to the individual who wrote the returned check. The letter states that the amount of the check plus a collection fee of \$5 plus current bank fees for returned items must be paid in the form of cash, money order, or cashier's check. If the check writer approaches an officer to make payment, the individual should be directed by the officer to the ASI Business Office to make the payment. ASI Club Services will not be able to track payments or record the transaction accurately if done otherwise.

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

## Availability of Funds

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

## Credit Card Transactions (Non-Donation Related)

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

RSOs interested in accepting credit card payments will be required to utilize PayPal. To receive a PayPal button next to your club name on the online Club Directory, please complete the PayPal Button Request form found on the [Forms and Resources page](#)<sup>22</sup> of the Cal Poly website. All requests to receive a PayPal button must be submitted 14 days in advance to allow for processing. Note: PayPal imposes a fee for this service (currently \$.30 and 2.9% per transaction) and this fee will be passed on to the RSO.

## PayPal Buttons

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

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

## Obtaining Funds from a State Department or Entity

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

To request an invoice, submit back-up documentation to ASI Club Services (e.g., email authorization, Purchase Order received by the RSO, event registration forms). As soon as the ASI invoice is created (approximately 7 business days), the reimbursement amount will appear on the RSOs transaction report. However, this does not mean that the invoice has been paid. To confirm that the invoice has been paid, contact ASI Club Services.

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

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

RSOs may use RSO funds to pay invoices and reimburse members by filling out a Club PRF. A Club PRF is a form to request that funds be paid to a person, business, or other RSO (in the form of a check or transfer) or reserved in the RSO's account (through a Purchase Order) to ensure payment to a vendor or

---

<sup>22</sup> Forms and Resources: <https://clubs.calpoly.edu/forms-and-resources>

service provider at a later date. This form requires both an advisor and officer signature, which is verified from the current Charter. The officer signature must be different than the payee. If the Club PRF is submitted with all required information, signatures and supporting documentation, the payment will be available for pick-up within five to seven business days. Payments can be picked up during ASI Club Services business hours.

### Club Payment Request Form (PRF) Guidelines

- The purchase of prepaid credit cards or gift cards for vendors who sell alcohol (e.g., grocery stores, restaurants) cannot be reimbursed. Since items bought with a prepaid credit card or gift card cannot be tracked, there is no way to ensure alcohol was not purchased.
- Payment Request Forms cannot be used to request petty cash. Petty cash is not available to clubs.
- Club members cannot sign Club PRFs to reimburse themselves. Another officer with financial authorization must sign the Club PRF for checks and balances purposes.
- The following information must be included on all Club PRF's:
  - Payee name.
  - Payee mailing address (regardless of whether the check is being mailed or held).
  - Payee phone number.
  - Payee Cal Poly email address (if applicable).
- The payee listed on the back-up documentation must match the name of the payee on the Club PRF. Reimbursements can only be made to the person that paid for the expenses. If the payee listed on the Club PRF and the name on the receipts does not match, the club advisor will be required to provide an explanation of the situation prior to the Club PRF being processed. The advisor explanation does not guarantee approval of the Club PRF.
- Reimbursements for pre-payment items cannot be processed before the product/service has been received, unless otherwise stated in an officially approved contract. If prepayment is required, RSOs must follow the Purchase Order guidelines.
- RSOs will be required to include the payee's Cal Poly email address (if applicable) on all Club PRFs. If an email address is not provided, and cannot be confirmed by ASI Club Services, the Club PRF will be returned to the RSO's mailbox.
  - If the payee is not affiliated with the university, RSOs must write "n/a" in the space provided for the Cal Poly email address.
- "White out" correction fluid (e.g., White-Out, Liquid Paper) may not be used on Club PRFs since ASI Club Services cannot verify when it was used (i.e., before or after signatures). Club PRFs submitted with "white out" will be returned to the RSO to be redone. If changes are necessary, follow these steps:
  - Draw a single line through the incorrect information and have the RSO officer initial next to it.
  - Write the correct information on the form.
  - The correct information must be initialed by the advisor prior to submitting to ASI Club Services.
- Please note that if your club has received ASI Club Co-Sponsorship or College Club Council funding any payments processed through a PRF will utilize those funds until they are fully allocated.
- The Club PRF includes an additional question pertaining to the use of the use of Cal Poly's marks.
  - This checkbox informs ASI Club Services whether or not any merchandise being reimbursed or paid for uses the Cal Poly name, logos, marks, and/or symbols. If you select "yes," the appropriately signed copy of the Request to Use the Cal Poly Name/Marks form must be attached to the Club PRF in order to be processed. If you select "no," this indicates that the organization has not used the Cal Poly name, logos, marks, and/or symbols on the items being paid/reimbursed for. If this checkbox is left blank and the back-up documentation shows that merchandise using the Cal Poly name, logo or any marks has been purchased, the Club PRF will not be processed and will be returned to the organization's mailbox.

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.

Note: Every year, the Club PRF is updated. The most current form can be found on the [Forms and Resources page](#)<sup>23</sup> of the Cal Poly website. Failure to use the most recent form could result in the Club PRF being returned.

### **Payment Request Form Back-up Documentation**

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

Any receipts submitted without proof of payment will not be reimbursed.

Lost receipts require a bank statement and advisor memo to be reimbursed. Lost receipts for cash purchases will not be reimbursed, even with an advisor memo.

Note: Do not highlight receipts as the receipt ink becomes unreadable. As an alternative to highlighting, please circle any items that you would like identified with an ink pen.

### **Payment Request Form for Reimbursement**

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

- Original itemized company receipt/invoice:
  - Lists the items purchased.
  - Receipt/invoice must show that payment was made via cash, check, or credit card.
  - Receipt/invoice must provide company name and contact information.
- Original handwritten receipt/invoice:
  - Must have company name and contact information imprinted on the receipt.
  - Lists the items purchased.
  - Receipt/invoice must show that payment was made via cash, check, or credit card.
- Online orders:
  - Print copy of acknowledgment of order (should be the final receipt) with the payee name and listing items and costs.
  - Documentation must state that payment was made via cash, check, credit card and/or show the total amount paid or show a zero balance due.
- All receipts must be legible in order to be processed. If a receipt is not legible, an individual in the organization will be required to contact the vendor/service provider to request a reprint of the receipt and attach it to the Club PRF along with the original illegible receipt.
  - Highlighting receipts can cause the ink to disappear over time.

### **Payment Request Form for Invoices**

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

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

---

23 Forms and Resources: <https://clubs.calpoly.edu/forms-and-resources>

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

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

### **Invoices from On-Campus Vendors**

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

### **Invoices from Off-Campus Vendors**

If ASI Club Services receives an invoice in the mail from an off-campus vendor and the RSO does not have a Purchase Order on file, the invoice will be placed in the RSO's mailbox. The RSO must then complete a Club PRF and provide appropriate supporting documentation to pay the vendor (see the "Club PRFs for Invoices" section above).

### **Payment Request Form for Contracts**

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

- An approved contract detailing:
  - 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.)

### **Payment Request Form for Scholarships**

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

- Make the Club PRF payable to CPSU Financial Aid.
- The student's Employee ID#.
- The student's Cal Poly email address
- Address the Club PRF to (Payee Street Address) Administration Bldg. 131 E.

Back-up documentation for a scholarship must include:

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

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

Submit the completed Club PRF to ASI Club Services. ASI Club Services will check the Club PRF for completeness and correct signatures. If complete, the Club PRF will be processed and a check will be

sent to the Cal Poly Financial Aid Office. Financial Aid will either directly deposit the scholarship into the recipient's account or a check will be mailed to the current mailing address on the recipient's Cal Poly Portal. It takes approximately two to four week to process and distribute a scholarship.

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

### **Payment Request Forms for Awards**

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

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

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

### **Payment Request Form for Donating Funds**

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

### **Payment Request Form for Purchase Orders**

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

By having a Purchase Order on file it will ensure the club has sufficient funds in the club account to cover the expenses being requested. Most campus entities will require a Purchase Order from a club prior to providing any goods or services (unless the club has decided to pay out of pocket and be reimbursed after).

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

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

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

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 must be submitted to ASI Club Services in order for the vendor to receive final payment.

### **Club Payment Request Form for Transfers**

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

Back-up documentation for a transfer must include:

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

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

## **Charging Privileges**

### **On-Campus Vendors**

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

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

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

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

### **ASI**

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

After the event, ASI Club Services will send a notification email to the president and advisor with the charge amount and a description of the charge. It is your responsibility to respond to ASI Club Services if you do not approve payment of these charges. If a response is not received within five business days of

notification, the bill will automatically be paid and the funds will be removed from the club's account. The following ASI departments will charge back after the product or service has been received.

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

## Sales Tax

Clubs must abide by sales tax reporting laws. California has a "sales and use tax," which means that for all purchases, except for services, sales tax must be paid. If the vendor does not collect California sales tax from the purchaser, such as the case with out-of-state orders, ASI must assess the club for the tax that should have been collected by the vendor and remit it to the State Board of Equalization directly. Accounts Payable will determine if a sales tax reporting issue is present. This assessment may result in a different amount recorded for disbursements than originally requested.

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

Another sales tax issue occurs when a club member pays out-of-pocket for club expenses and personal items on the same receipt. Be sure to include the appropriate sales tax to the reimbursement amount. Check the receipt for the appropriate sales tax rate since sales tax rates vary throughout California. ASI Club Services will adjust the sales tax if necessary. To simplify the payment process, members should be encouraged to keep club and personal purchases separate.

## Tax Rates

As of October 2017, the following tax rates were in effect:

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

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

The tax rates for other cities and/or counties may vary. Please check receipts for the appropriate reimbursable tax rate. The sales and use tax rates by city and county can also be found on the [California State Board of Equalization](http://www.boe.ca.gov).<sup>24</sup>

## Avoiding Delays

### Processing Delays

Incomplete paperwork submitted for processing may cause processing delays. ASI Club Services attempts to minimize these situations by reviewing documents when received. However, if incomplete paperwork is submitted that will cause a processing delay, the listed club officer and/or advisor will be contacted and the incomplete paperwork will be placed in the club's mailbox. Once any issues are resolved, the paperwork can be resubmitted for processing.

---

<sup>24</sup> California State Board of Equalization: <http://www.boe.ca.gov>

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

## Financial Statements

ASI Club Services provides transaction reports upon request.

## Gift and Donation Processing

### Receiving Credit Card Donations

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

Follow these directions to use the website:

- Go to the [Cal Poly](#)<sup>25</sup>
- Click on “Giving.”
- Click on the “Give Online” button towards the right.
- Enter your donation amount.
- Click on the “Select College and Program(s)” section. Scroll down to “Student Affairs.” Click on the club you want to make a donation to. (If the club is not listed, select “Other,” then Continue, and write the club name in the “Enter fund not listed” textbox.
- Complete the “Information About You” section.
- Click on the “Save and Continue” button.
- Please review the transaction. If everything is correct, click on the “Pay Now” button. This will forward you to PayPal to complete the transaction.

The donation will now be processed and deposited into the club’s account.

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

### Receiving Cash or Check Donations

For donations by cash or check, complete a Cash/Securities Gift Information form, available on the [Forms and Resources page](#)<sup>26</sup> of the Cal Poly website. A separate form must be completed for each

---

<sup>25</sup> Cal Poly: <http://www.calpoly.edu>

<sup>26</sup> Forms and Resources: <https://clubs.calpoly.edu/forms-and-resources>

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. For security reasons, Cash/Securities Gift Information Forms cannot be placed in the ASI Club Services drop box. Completed forms must be handed directly to an ASI Club Services representative at least 30 minutes prior to close of business. 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

In an effort 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 student clubs to solicit funding if the request is \$2,500 or more.
- Students Affairs fundraising staff will work with students and clubs to ensure their "asks" are within university guidelines, and will include students in the solicitation process as appropriate and possible.
- You may also contact your College Development Office for guidance:
  - College of Agriculture, Food, and Environmental Sciences: Russ Kabaker [rkabaker@calpoly.edu](mailto:rkabaker@calpoly.edu)
  - College of Architecture and Environmental Design: Lorna Malcolm [lmalcolm@calpoly.edu](mailto:lmalcolm@calpoly.edu)
  - Orfalea College of Business: Mary Kelting [mkelting@calpoly.edu](mailto:mkelting@calpoly.edu)
  - College of Engineering: Elise Erb [eerb@calpoly.edu](mailto:eerb@calpoly.edu)
  - College of Liberal Arts: Dave Cohune [dcohune@calpoly.edu](mailto:dcohune@calpoly.edu)
  - College of Science and Math: Ruzena Brar [rkbrar@calpoly.edu](mailto:rkbrar@calpoly.edu)
- Cal Poly Athletics: Ashley Offermann [aofferma@calpoly.edu](mailto:aofferma@calpoly.edu)  
If your club is not affiliated with a specific college, please contact ASI Club Services for guidance.

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

For donations of supplies or other goods, complete a Gift-in-Kind Acceptance form available from [Cal Poly Advancement Network](#)<sup>27</sup>. 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 at least 30 minutes prior to close of business.

## Gifts-in-Kind with a Value Greater Than \$5,000

All gifts-in-kind with a value greater than \$5,000 are to be reported immediately upon receipt with a Gift-in-Kind Acceptance form available from [Cal Poly Advancement Network](#)<sup>27</sup>. All gifts-in-kind from individuals with a value more than \$5,000 and all gifts that require special expertise to establish the value, (e.g., works of art, horses) must include an appraisal executed by a qualified independent appraiser. The appraisal cannot be made more than 60 days prior to the date of the gift. If the value of the gift in the appraisal is listed as a range of values, the gift will be booked at the midpoint of the range. In most cases, gifts-in-kind that are produced or manufactured by a corporation or other business making the contribution that have a value more than \$5,000 must include an itemized inventory list, an invoice or letter from the vendor/donor, or published information on the value of the item(s). Gifts of

---

<sup>27</sup> Cal Poly Advancement Network: <http://www.advancement.calpoly.edu/content/forms/index>

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).

#### Gifts-in-Kind with a Value between \$100 and \$5,000

All gifts-in-kind with a value between \$100 and \$5,000 are to be reported immediately upon receipt with a Gift-in-Kind Acceptance form available from the Forms and Policies section of the ASI Cal Poly website.

Written documentation provided by the donor is required to establish the value of the gift for all gifts in-kind. Any gift-in-kind with a value in the range of \$100 to \$5,000 that is not accompanied by such documentation from the donor will be recorded on the university's gift record system with a nominal value (\$1).

#### Gifts-in-Kind with a Value under \$100

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

#### Items Not Considered Charitable Contributions

Based on CASE and FASB guidelines as well as IRS regulations, the following types of gifts-in-kind contributions are not considered charitable contributions and will not be included in the university's annual fundraising totals:

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

#### Gift Recipient

The advisor must be listed as the recipient of the gift-in-kind on the Gift-in-Kind Acceptance form.

#### Donee of Gift

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

#### 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.

### **Gift-in-Kind Acknowledgements**

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

### **Donating Club Funds**

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

### **ASI Club Funding**

In support of the ultimate college experience, ASI Club Funding is available to currently chartered clubs operating under contract with the university. Funding is available to enhance the cultural, educational, social, and recreational opportunities for all Cal Poly students.

### **Eligibility**

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

## **Terms of Funding**

Clubs may apply for both ASI Club Sponsorship and ASI Event Co-Sponsorship funding with a maximum combined allotment of \$1,650 per club per fiscal year (i.e., July – June). For example, if your organization requests \$500 through ASI Club Sponsorship, your club is still eligible to apply for up to \$1,150 in ASI Club Event Co-Sponsorship for a maximum allotment of \$1,650.

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

### **ASI Club Sponsorship (\$500)**

ASI Club Sponsorship is available at a maximum of \$500 per fiscal year. ASI Club Sponsorship is intended to support clubs with their general expenses.

### **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). Club Sponsorship funds cannot be used to fund the remaining 50%. The \$1,650 may be applied to one single event or multiple events. An application must be submitted for each event and the total awarded across all events may not exceed \$1,650.

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

### **ASI Club Event Insurance Assistance (up to \$250 per quarter)**

ASI Club Event Insurance Assistance is available up to six times per fiscal year (two times per quarter) at \$250 each for a maximum of \$1,500 per fiscal year. ASI Club Event Insurance Assistance can fund up to 100 percent of the total eligible event insurance not to exceed \$250 per event. Insurance premiums exceeding \$250 per event will be the financial responsibility of the club. Clubs are eligible for ASI Club Event Insurance Assistance for no more than two events in an academic quarter.

ASI Club Event Insurance Assistance Applications must be submitted to ASI Club Services a minimum of 14 days prior to the date of insurance payment. An E-Plan must be on file for the event prior to the application submission. An application for each event must be completed and submitted to ASI Club Services.

### **ASI Club Sports Funding (up to \$6,000)**

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

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

sport club recognized within the Club Sports Council to the Chair of the ASI Board of Directors by the last Board meeting of the academic year.

### **College Council Funding (\$424.00 + \$0.16 per Student per College)**

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

### **College Club Council Event Co-Sponsorship (up to \$1,150)**

ASI College Club 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 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.

### **Bank Account Exceptions**

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

In order to be considered, organization representatives must submit a [Banking Exception Request Form](#)<sup>28</sup> and a completed Form 990 from their affiliated organization with tax exempt status for each year they wish to bank off campus. Banking exception requests must be submitted with the organization's Club Charter by the deadline listed on the [club website](#)<sup>29</sup>

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

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

---

<sup>28</sup> Banking Exception Request Form: <https://content-calpoly-edu.s3.amazonaws.com/clubs/1/documents/Banking-Exception-Request.pdf>

<sup>29</sup> Banking Off Campus: <https://clubs.calpoly.edu/money/banking-off-campus>

# Contact Information

## ASI Club Services

Epicenter

Phone: 805-756-5807

Fax: 805-756-7121

Email ASI Club Services: [asiclubservices@calpoly.edu](mailto:asiclubservices@calpoly.edu)

## ASI Facility Reservations (E-Plan Assistance)

Epicenter

Phone: 805-756-7587

Fax: 805-756-7121

Email ASI Facility Reservations: [asieplan@calpoly.edu](mailto:asieplan@calpoly.edu)

## Dean of Students Office, Clubs & Organizations

UU, Room 217

Phone: 805-756-7006

Email Clubs & Organizations: [clubs@calpoly.edu](mailto:clubs@calpoly.edu)