the in former
STUDENT ORGANIZATION HANDBOOK
FISCAL GUIDELINES FOR THE EXPENDITURE OF STUDENT ACTIVITY FEES
Welcome to student life at Baruch College! We are excited that you have chosen to get involved in the community outside the classroom. Student Life is dedicated to ensuring that you are exposed to a rich array of educationally diverse opportunities. To that end, we have put together a comprehensive and useful resource to guide you in developing, shaping, and leading a successful student organization at Baruch College.

The Informer will provide you with all the information needed to effectively and strategically manage your leadership role within your student organization.

This handy resource will help you to:

1. Understand how to form and/or register an existing club
2. Understand how to run your organization
3. Become an effective and strategic student leader
4. Gain familiarity with college policies and procedures
5. Understand fiscal guidelines associated with the spending of Student Activity fees

In addition to reviewing this handbook you are strongly encouraged to set up an appointment with your Student Life Advisor. Your Advisor will be instrumental in helping you have a successful year.

See you around campus. We look forward to working with you.

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1 Sections of this handbook have been developed using policies and procedures noted in the City University Fiscal Handbook for the control and accountability of Student Activity Fees (1992)
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The Informer is also available for download on the Student Life website. For the latest updates, amendments, and changes please check our website.
STUDENT LIFE GENERAL INFORMATION

THE OFFICE OF STUDENT LIFE
The Office of Student Life strives to develop the co-curricular college experience of Baruch students through a rich array of educationally diverse programs, opportunities for leadership and civic engagement, club and organization development, and community building. Student Affairs Educators experienced with enhancing and developing the Baruch student experience are available to work with you on your leadership journey.

The office is located in the Newman Vertical Campus (NVC) 2-210
Phone: (646) 312-4550 Fax: (646) 312-4551
Monday to Friday 9:00 AM to 8:00 PM
*Note: Intersession and summer hours vary

STUDENT GOVERNMENT
Student governance is a crucial part of extracurricular life at Baruch College. Through their officers and committees, they oversee the granting of club charters and budgets. Student governments serve as student representatives to the faculty and administration within the College and, as a result, have an important role in creating and implementing policies that affect the College community, which in turn gives club leaders a voice in the decisions that impact student life. Student organizations work with the Office of Student Life and one of the two student governments: the Undergraduate Student Government and the Graduate Student Assembly.

UNDERGRADUATE STUDENT GOVERNMENT (USG) consists of eighteen senators elected at-large: four vice presidents, and fourteen representatives, as well as a president, executive vice president, secretary, treasurer, and two University Student Senate representatives. Elections take place during the spring semester.

GRADUATE STUDENT ASSEMBLY (GSA) consists of all duly enrolled graduate students at Baruch College. These students nominate and vote for the Board of Governors of the Graduate Student Assembly, which acts as an executive committee for the association.

BOARD OF DIRECTORS, BERNARD M. BARUCH COLLEGE ASSOCIATION, INC.
The Undergraduate Student Government (USG) and Graduate Student Assembly (GSA) are fiscally responsible to the Bernard M. Baruch College Association, Inc., which is governed by a corporate Board of Directors. This board reviews and approves the annual budgets, budget requests, and policy decisions of the respective operating boards under its jurisdiction, listed below. There is student representation on each of these boards.

COMMUNICATIONS BOARD is concerned with policies and fiscal matters relevant to the student publications and broadcast facilities.

ATHLETICS BOARD recommends and provides oversight for the expenditure of student fees for athletic purposes.

STUDENT CENTER BOARD recommends policies and establishes rules and regulations governing the Student Center and its related operations and programs. It also provides fiscal oversight for matters associated with the operation of the Student Center and its programs.

PROGRAMMING BOARD reviews and recommends to the Undergraduate Student Government programs that will promote and cultivate educational and social relations among the students, faculty, and administrative staff of the College by providing a variety of high quality, robust, creative, and entertaining programs that appeal to diverse audiences.

HEALTH CARE BOARD recommends and reviews health programs and activities for the Baruch student
community in keeping with the overall mission of health prevention, education, and medical treatment.

**Student Services Accounting Unit**
The Student Services Accounting Unit is responsible for processing all fiscal paperwork related to clubs and organizations. All club budgetary expenditures are processed through the Student Services Accounting Unit.

**Club Hours**
There are limited classes scheduled on Tuesdays from 12:25 PM to 2:30 PM and no classes scheduled on Thursdays from 12:25 PM to 2:30 PM to enable students to participate in club life and co-curricular activities. Club hours are used for a variety of purposes such as weekly club meetings, lectures and professional and social events.

**Student Activity Fees**
All registered full-time and part-time students pay a student activity fee. For the 2015-2016 academic year, student activity fees are the following per semester:

- Undergraduate Full-time fall/spring: $125.60
- Undergraduate Part-time fall/spring: $85.60
- Graduate: $39.60
REGISTERED CHARTERED CLUBS

In order to function on campus, a club must be successfully registered every year with the Office of Student Life. Additionally, registered clubs must also be chartered by the pertinent Student Government, in order to be eligible for a club budget. Note that chartered clubs are not necessarily registered clubs. Clubs and Organizations must adhere to and follow college conduct policies and procedures\(^2\). Registered Clubs have access to the following resources:

**Student Activities Advisor**
Each registered club will be assigned an Advisor through the Office of Student Life. Maintaining a good relationship with your Advisor is crucial to your success as a student club. Your Advisor works closely with student government and all other departments on your behalf. Your Advisor’s approval is also needed for space reservation and certain fiscal items. We encourage you to set up a meeting with your Advisor to discuss plans for the upcoming year or if you have any questions or concerns.

**Club Budget**
All registered and chartered clubs will have access to their student government allocated club budget once they have registered and are approved by the Office of Student Life. Clubs that have not completed the process will not be given approval.

**Club Meeting Space**
Only registered clubs are allowed to apply for a weekly club meeting space. Meeting spaces will be granted based on availability at the discretion of the Office of Student Life.

**Club Office**
Space is limited on campus but there is opportunity for your club to have an office space. Every year, all qualifying clubs must go through a lottery system in order to secure a space. Only registered clubs can qualify for lottery. During the spring semester, the Office of Student Life will make Club Office Space Applications available via the Student Life website. Clubs should register each academic year for a club office.

**Locker**
The Office of Student Life offers lockers for clubs that are in need of storage space and are not Club Office Suite residents. In order to secure a club locker, please visit the Office of Student Life. Contingent on availability, you will be assigned your locker number and lock combination for the current academic year.

**Printing Account**
Every registered club is entitled to a free printing account to use for club-related printing. The president or treasurer can pick up the password at the beginning of the academic year from the Office of Student Life. Printers are located in the Club Office Suite and the Library Building computer labs.

**Fax**
Incoming faxes for club business can be sent to the Office of Student Life at (646) 312-4551 and must include the name of your club. Faxes will be placed in your club mailbox. Outgoing faxes for club business can be sent with the Office of Student Life staff approval.

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\(^2\) All Baruch student members of clubs and organizations must adhere to and follow the Baruch College Code of Student Conduct, Articles XV and XVI of the CUNY bylaws noted by the Board of Trustees of the City University of New York and the City University Fiscal handbook for the control and accountability of Student Activity fees. Please refer to the Baruch College website at [www.baruch.cuny.edu](http://www.baruch.cuny.edu) for further information.
Mailbox
Mailboxes are available for registered student clubs in the Office of Student Life. Please try to ensure that letters and packages sent to your organization include the name of your club and the proper mailing address:

Baruch College
Office of Student Life, Box B2-210
1 Bernard Baruch Way New York,
NY 10010
Attn:
(Your name)
(Your club/organization)

Mailroom
The use of mailroom facilities is restricted to duly registered clubs and organizations.

• Intra-College mailings consisting of ten or more pieces must be sorted in bundles to ease distribution. A return address or clear indication of the sponsoring organization is required.

• For mailing external to the College, you must contact the Student Services Accounting Unit who will certify to the mailroom that sufficient funds are available and make arrangements for the appropriate charges to be made against your budget allocation.
REGISTERING AN EXISTING CHARTERED CLUB

At the beginning of every academic year, chartered clubs and organizations must register with the Office of Student Life\(^3\). Registration opens in mid-August and closes the Monday following the annual Club Fair. To stay active, every chartered student club must:

- Have both the president and treasurer attend a Baruch Officer Leadership Training Workshop (BOLT)
- Submit a Club Registration Form, including an updated club constitution, to the Office of Student Life via the Student Life website
- Have both the president and treasurer submit signatures to the Student Services Accounting Unit

Additionally, the Office of Student Life reserves the right to request a letter of support from any national or international organization that desires to have a chapter on the Baruch campus. The letter of support should include the following items:

- A statement on the organization’s letterhead that gives the club the permission to use their name
- Contact information for the organization’s representative(s)
- Release of any archived documents or communications that relate to the development of the club at Baruch College

REGISTERING A GREEK LETTER CLUB

For student clubs that identify as Greek lettered, there are additional guidelines that must be followed in order to remain active. Note that only previously chartered Greek Letter Clubs are eligible to register with the Office of Student Life. In order to successfully register:

- The organization must submit current membership rosters (noting all active and inactive members) to the Office of Student Life. Once submitted no new members can be added to these rosters without the written approval of the Dean of Students.
- The Office of Student Life will conduct a disciplinary check on the club’s members and its activities in consultation with the Dean of Students Office
- A letter of support must be provided by the National affiliate on Organization letterhead.
- All members of Greek Organizations (Honor, Business, Service & Social) must participate in mandatory training programs on anti-hazing, anti-bullying, and prevention of sexual harassment and sexual violence\(^4\).

Following the registration period, Greek Letter organizations must adhere to any and all established Greek Letter processes and protocols including, but not limited to, conducting all activities of Baruch social Greek organization on the Baruch campus, unless a specific, prior exception is granted by the Dean of Students.

**There will be no new membership intake process for social Greek Life clubs until the 2018-19 academic year as noted in the “Baruch College extension of moratorium on pledging and rush activities” letter issued by Baruch College on May 5, 2015.**

\(^3\) No budget transactions, room reservations, meeting rooms, club office space, or keys will be processed until the entire registration process is complete.

\(^4\) These mandatory trainings must be attended by Baruch College Honor, Business, Service and Social Greek Lettered organizations.
STARTING A NEW CLUB

Baruch students are visionary and entrepreneurial, and so it is no surprise that over 20 new clubs are started each year. It takes a lot of work to get a new club running so make sure to verify if Baruch College has a similar club registered with the Office of Student Life.

First, review the club directory found in the Office of Student Life. Your club must be truly unique from other clubs or else you will be asked to join an existing organization.

Next, once you are convinced that your vision for a new club is unique you will be asked to take these steps:

1. Fill out the new club request form located in the Office of Student Life.
2. Once your application has been submitted, schedule an appointment to speak with an Activities Advisor. This conversation will help you understand the new club process. Each club is different so we have developed a registration process that will meet the needs of your club.
3. Following the appointment, coordinate and fulfill the requirements noted in your application such as co-sponsoring events, membership requirements, and general interest meetings
4. Once you have fulfilled the requirements of the new club process, you will sit for an interview with the Office of Student Life and USG/GSA to review your total application.
5. If approved, your club will be chartered by the respective Student Government and become eligible for a club budget.

Note that new club applications are only accepted during a limited time period each semester. Contact the Office of Student Life for deadlines.

Please note: Academic Honor Society or any club that relates to a Baruch College academic department (example- History, Finance, French) must have a Faculty Advisor in addition to a Student Life Advisor.
Sports and adventure-related clubs may not be approved due to risk management and liability insurance expenses.
RESERVING EVENT SPACE GUIDELINES

Only student clubs officially registered by Baruch College, and whose president and treasurer have attended a BOLT Workshop, are eligible to reserve space or equipment. There are two types of event spaces that a club can reserve: **general event spaces** and **large-scale event spaces**.

A reservation should follow the rolling reservation schedule based on space type. Have an alternate date, time, and location in case your original choice is not available. Please indicate AV needs on your reservation to ensure equipment will be available for use.

Your club may reserve a table in the Atrium of the Newman Vertical Campus and/or 151 East 25th Street buildings for promotional activities such as the distribution of literature, recruitment drives, petition signature drives, ticket sales, etc. When clubs reserve a table they must schedule a club member(s) to staff the table at all times. Your club is responsible for clean-up after tabling. Tabling is available on a first come, first served basis within the rolling reservation schedule.

**APPROVAL PROCESS**
You will receive an email from the reservation system after submitting your request. This is **not** a confirmation of the space. A confirmation email will be sent to your Baruch email address within 2 to 3 business days of submitting your request. You will receive one of the following types of emails:

- **Approved**: Your request has been approved.
- **Denied**: Your request has been denied. Please follow the instructions provided in this email.
- **Waitlist**: Another request has been approved in the space requested. If more than one room was not originally selected, this notifies you that the space is no longer available. (Often this notification is generated shortly before a denied email is sent).

**IMPORTANT REMINDERS**
Scheduling of rooms must allow for at least 1 hour for set-up and 1 hour for dismantling and clean-up for every facility.

- Submitted requests will be returned via email to the person who submitted the request.
- To avoid double bookings and conflicting requests, one member of the organization should be designated to submit requests and make arrangements.

**CANCELLATIONS/ROOM CHANGES**
Clubs and organizations are required to email their Advisor at least 24 hours in advance if they are not going to utilize a room/table. Clubs who do not abide by this cancellation policy will risk losing their room/table reservation privileges if a consistent problem is identified by the Office of Student Life. Student Assistants from the Office of Student Life will be walking around to ensure that the rooms are open and being utilized by the appropriate club. If your organization is looking to swap club rooms with another organization, this needs to be approved by your Advisor.

Failure to comply with the cancellation policy will result in the follow action:

- **1st Offense**: Warning email sent from the club Advisor
- **2nd Offense**: A meeting will be held with the club Advisor
- **3rd Offense**: Loss of room/table reservation privileges for a month

The Office of Student Life reserves the right to shift room assignments in order to better serve all Baruch students. Factors that will be taken into consideration when making these shifts include, but are not limited to, the nature of the event and the room capacity.
GENERAL EVENT SPACES

The Office of Student Life manages general event spaces.

<table>
<thead>
<tr>
<th>Room #</th>
<th>Type</th>
<th>A/V Needs</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>NVC 2-125</td>
<td>Event Space</td>
<td>A/V Request</td>
<td>65</td>
</tr>
<tr>
<td>NVC 3-215</td>
<td>Event Space</td>
<td>Smart Classroom</td>
<td>40</td>
</tr>
<tr>
<td>NVC 3-210</td>
<td>Meeting Space</td>
<td>Smart Classroom</td>
<td>29</td>
</tr>
<tr>
<td>NVC 2-110</td>
<td>Event Space</td>
<td>A/V Request</td>
<td>25</td>
</tr>
<tr>
<td>NVC 3-240</td>
<td>Conference Room</td>
<td>A/V Request</td>
<td>20</td>
</tr>
<tr>
<td>NVC 3-216</td>
<td>Conference Room</td>
<td>A/V Request</td>
<td>12</td>
</tr>
<tr>
<td>2nd Floor Lobby</td>
<td>Open Area</td>
<td>None</td>
<td>13 Tables</td>
</tr>
</tbody>
</table>

FALL 2015
GENERAL EVENT ROLLING RESERVATION SCHEDULE

FALL 2015
Starting on Monday, August 17th through Friday, September 18th
Friday, September 4th through Friday, October 16th
Friday, October 2nd through Friday, November 20th
Friday, November 6th through Friday, December 18th*

SPRING 2016
Starting on Tuesday, January 19th through Friday, February 19th
Friday, February 5th through Friday, March 18th
Friday, March 4th through Friday, April 15th
Friday, April 1st through Friday, May 20th*

*last day of student events
LARGE-SCALE EVENT SPACES

If your club wishes to host a large-scale event a Large-Scale Event Proposal form found on the Student Life website must be submitted to your Advisor. Your submission request must be made using the rolling reservation calendar schedule for large-scale events (noted below). Your club will list your preferences for rooms/dates. A committee of Student Life Advisors and Student Government representatives will review all proposals. Space will be allocated based on quality of the proposal, uniqueness, event space availability, and tradition at the College. Clubs are encouraged to work on this proposal with their Advisor so they have a better understanding of the event before the proposal is submitted. After the rolling reservation deadline for large-scale events, other large-scale events will be considered on a first come, first serve basis.

LARGE-SCALE EVENT SPACES

<table>
<thead>
<tr>
<th>ROOM #</th>
<th>CAPACITY</th>
<th>TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>NVC 1-107</td>
<td>225</td>
<td>Student Life</td>
</tr>
<tr>
<td>Library Building 750</td>
<td>170</td>
<td></td>
</tr>
<tr>
<td>NVC 14-220</td>
<td>250</td>
<td>Conference Services</td>
</tr>
<tr>
<td>NVC 14-250</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Aux Gym</td>
<td>382</td>
<td>Athletics</td>
</tr>
<tr>
<td>Main Gym</td>
<td>838-1230</td>
<td></td>
</tr>
<tr>
<td>Dance Studio</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Engelman Hall</td>
<td>175</td>
<td>BPAC</td>
</tr>
<tr>
<td>Mason Hall</td>
<td>626 Lower 426 Balcony</td>
<td></td>
</tr>
<tr>
<td>Nagelberg</td>
<td>220</td>
<td></td>
</tr>
</tbody>
</table>

LARGE-SCALE EVENTS ROLLING RESERVATION SCHEDULE (submitted by 12pm of the noted deadline date):

Between September 14th and October 1st
Between October 2nd and October 30th
Between November 1st and December 13th
Between February 1st and March 1st
Between March 2nd and April 21st
Between May 2nd and May 20th

Deadline: August 31st
Deadline: September 18th
Deadline: October 16th
Deadline: January 11th
Deadline: February 19th
Deadline: April 21st
CLUB BUDGET DETAILS

BUDGET BASICS

One of the president’s or treasurer’s primary responsibilities is to obtain funding for their club or organization. Below are the most frequently asked questions about the club budgeting process.

Q: Who can get a budget?
A: Any registered student club or organization. Your club registration must be renewed every academic year.

Q: How does a club get a budget?
A: Graduate Clubs: By submitting a written budget request to the GSA treasurer.
Undergraduate Clubs: By submitting a budget request to the USG Chair of Finance via email to finance@usgbaruch.com.

Q: Where does the money come from?
A: Student activity fees.

Q: Who prepares the budget request?
A: We recommend that the current and incoming club treasurer and president work together to prepare the annual budget request. In order to ensure this we recommend that new officer elections should take place by April 15th.

Q: What is the procedure for submitting a budget proposal?
A: Club budget proposal forms can be found in the Club Resources section of the Student Life website.

Q: When do I submit my club's budget request?
A: Budget requests are prepared and submitted during the spring semester for funds that will be used during the following academic year. It is recommended that new officer elections be held prior to submitting a budget request.

Q: When do I find out the final approved budget?
A: Clubs will be notified regarding the amount of their final budget by the end of the fiscal year on June 30th.

Q: When can I begin spending money from the club budget?
A: Clubs do not have access to their budgets until the first day of classes of the fall semester. Clubs will not be allowed to access their budgets until the following steps are complete:
   1. Your club has completed club registration for the academic year.
   2. President and treasurer attend Baruch Officer Leadership Training Workshop (BOLT).
   3. President and treasurer file a signature card with the Office of Student Life.

Q: Can new clubs get a budget?
A: New clubs will go through a probationary period before they are approved as a chartered and registered organization. During this time, the appropriate Student Government will co-sponsor all approved new club events.
HOW DO I SPEND CLUB MONEY?

One of your most important responsibilities is to effectively manage your club’s budget and monitor all club purchases. This section describes a variety of club purchasing procedures.

The complete guidelines for budgeting and expending student activity fees, as established by the Board of Trustees of The City University of New York and by the Bernard M. Baruch College Association, Inc., are known as the Fiscal Guidelines for the Expenditure of Student Activity Fees. Club and organization officers are required to know these guidelines and will be held responsible for failure to adhere to them.

The pages in this section are designed to summarize the Fiscal Guidelines, and to offer them in a format that is easy for you to understand and utilize. They are not, however, intended to be used as a substitute for careful reading and understanding of the Fiscal Guidelines contained in this publication (appendix A.)

HOW DO I READ MY CLUB BUDGET?

Club budgets are broken down into two components: programs and lines.

PROGRAMS

These are the activities or the general types of activities that the club wants to do during the academic year (e.g., meetings, parties). In your budget, each program will be assigned a number and a name. Clubs may submit names for programs.

LINES

Each program is broken down into specific budget lines. The common budget lines are listed below. Other lines may be acceptable if they are defined according to their function:

- Contractual services (Cont): Guest speakers, performers, bands, disc jockeys, honoraria, film rentals, lighting/sound technicians, security, car and bus rentals, and hotel rooms.
- Refreshments (Ref): All food purchases (e.g., catering); includes meal allowances for conferences.
- Supplies (Sup): Paper products (plates, napkins, cups, utensils), decorations, flyers, posters, subscriptions, office supplies, newspaper ads, computer software.
- Equipment (Equip): Any tangible item with a useful life of at least one (1) year.
- Miscellaneous (Misc): Transportation (e.g., airline/bus/railroad tickets, taxis), tutoring, printing (e.g., newsletters, journals), professional chapter dues, postage, conferences/workshops (e.g., Leadership Training Weekend), prizes, speaker gifts, awards, t-shirts, rental equipment, pins.

LOVING LIFE CLUB (LLC)

<table>
<thead>
<tr>
<th>Program Name</th>
<th>Contractual Svs</th>
<th>Refreshments</th>
<th>Supplies</th>
<th>Equipment</th>
<th>Miscellaneous</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club Promotion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$50.00</td>
<td>$50.00</td>
</tr>
<tr>
<td>General Meetings</td>
<td></td>
<td>$180.00</td>
<td>$50.00</td>
<td></td>
<td></td>
<td>$230.00</td>
</tr>
<tr>
<td>Co-Sponsorships</td>
<td></td>
<td>$150.00</td>
<td></td>
<td></td>
<td></td>
<td>$150.00</td>
</tr>
<tr>
<td>Farewell Bash</td>
<td>$250.00</td>
<td>$100.00</td>
<td>$100.00</td>
<td>$50.00</td>
<td>$25.00</td>
<td>$525.00</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$250.00</td>
<td>$430.00</td>
<td>$150.00</td>
<td>$50.00</td>
<td>$75.00</td>
<td>$955.00</td>
</tr>
</tbody>
</table>
HOW DO I MAKE CHANGES TO MY CLUB BUDGET?

Once you have received your club’s annual budget from the Student Government, it is possible to make certain changes to the budget during the academic year. Every change requires the approval of the appropriate Student Government. You cannot request changes to your budget until the club president and treasurer have attended a BOLT workshop.

Prior to the end of the fifth week of the fall semester, you may make changes to your club budget programs on a line-by-line basis, and resubmit a revised budget to the appropriate Student Government. Your revised budget must be equal to the total allocation of funding originally approved by the Student Government.

After the fifth week of the fall semester, you may make changes (which are limited to 10% of the total budget) to your club budget.

Requests to make changes to your budget from one line to another or between programs must be approved by the appropriate Student Government through the budget modification process. You may not make any changes until the appropriate Student Government has approved these modifications.

APPEALS
You are able to appeal to student government for more money for program lines within your budget during the academic year. Please contact each student government for more information on their appeals process. Once appeal money has been granted and approved it cannot be used for any other purpose than the program originally appealed for.

PAYMENT REQUEST VOUCHERS
You must use a Payment Request Voucher for ALL expenditures.

SALES TAX
State and Local sales tax will not be reimbursed on any items. See the Student Services Accounting Unit (NVC 2-185) for a Sales Tax Exemption Certificate before you make a purchase. In order to pick up a certificate, you will need to know the name of the store and its address.

REIMBURSEMENTS: There will be no personal reimbursements for purchases that are more than $250.

HOW TO PROCESS A PAYMENT REQUEST VOUCHER
Step 1: Make sure you have enough money available in the proper program and line of your club budget to pay for the purchase. You may not make purchases that do not appear in your approved club budget. Remember you can get approval to move money between lines.

Step 2: Download a Payment Request Voucher from the Student Life Website. Payment Request Vouchers can be found by clicking on the Club Resources section of the Student Life website.

Step 3: Submit a Payment Request Voucher to the appropriate student government office. Submit a separate Payment Request Voucher for each vendor/payee.
Step 4: Attach the following information to the completed Payment Request Voucher:
   o Copy of the flyer, poster, or information sheet announcing the program. Make sure to include the name of your club or organization, the location, date, and time of your program. If refreshments are being served, it must also be specified. If your club is co-sponsoring this event with another club and you are covering some costs, then your club name and logo must appear on the flyer.
   o Original “paid” receipt(s) and/or invoice from the vendor that specify the word “PAID.” Each receipt/invoice must include the name and address of vendor/contractor, date, description of purchase, and amount. Kitchen checks/menus are not accepted as paid receipts. If the address is not included on the receipt, a business card must be attached for proof of location.
   o If personal checks are used, a copy of cancelled check is required (no more than $250 will be reimbursed).
   o If credit cards are used, a copy of the credit card statement is required. If the statement does not list the full name or the account number then a photocopy of the credit card must be attached.
   o As needed: Pre-bill invoice, approved contract, off-campus trip proposal.

Step 5: Check your club mailbox to make sure you have not received a voucher inquiry from Student Government.

Step 6: Student Services Accounting Unit will mail payment to the vendor/payee in 2 to 3 weeks, if the Payment Request Voucher and attachments are complete and accurate.
*If you wish to pick up your reimbursement check instead of it being mailed to you, please specify on the top of the voucher “for Pick Up” with the payee’s cell phone number.

Step 7: Club officers must maintain a record of all funds received and expended. Make sure you have copies of all club expenses.

### Payment Request Voucher Documents

(Required regardless of monetary value)

<table>
<thead>
<tr>
<th>Reimbursement*</th>
<th>Vendor Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Invoice**</td>
<td>• Invoice**</td>
</tr>
<tr>
<td>• Event Flyer***</td>
<td>• Event Flyer***</td>
</tr>
<tr>
<td>• President and Treasurer Signature</td>
<td>• President and Treasurer Signatures</td>
</tr>
<tr>
<td>• Credit Card Statement OR Cancelled Check</td>
<td>• W9</td>
</tr>
<tr>
<td><strong>Can PRE-BILL if 6 weeks in advance</strong></td>
<td></td>
</tr>
</tbody>
</table>

---

*Sales Tax will NEVER be reimbursed, get Tax Free form at the Accounting Unit (Some out-of-state exceptions).
**If there is no address on the ITEMIZED receipt at the business must include a stamp with an address on the receipt.
***Event flyer must include refreshments, date, time, and cosponsors.
# HOW TO FILL OUT A PAYMENT REQUEST VOUCHER

## Name of your club or organization

## PAYABLE TO:

- **Address:**
  - **Complete name and address of payee (Print legibly):**

## Check whether this payment is for a pre-bill, vendor invoice, or reimbursement

## Date of purchase

## Brief description of the purchase item(s), including quantity

## Date of invoice

## Vendor invoice number and date

## Club budget program and line to be charged

## Amount

## Total amount:

## Approval for payment

- I hereby certify that the above purchases, services or expenses have been received, rendered or incurred to my satisfaction. All appropriate invoices, purchase orders, prior approvals, etc. are attached as required by the fiscal guidelines of the Bernard M. Baruch College Association, Inc. and the policies and fiscal guidelines of the Board of Trustees of the City University of New York. The indicated cost is appropriately chargeable to the indicated budget line in accordance with the above-stated fiscal guidelines.

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## Signature of club president

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## Signature of club treasurer

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## Signature of appropriate student government officer

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## FOR STUDENT SERVICES ACCOUNTING UNIT USE

- **Account Code:**
  - **Amount:**

---

**CHECK NUMBER**
PURCHASE REQUISITION FORMS
You must use a Purchase Requisition form for any general purchase costing over $250.01 or more. If you have a contract, ALL contracts need to be accompanied by a Purchase Requisition form irrespective of the amount.

In order to get your vendor paid on time we recommend getting the Purchase Requisition form approved by the Office of Student Life at least two (2) weeks before purchases are made.

HOW TO PROCESS A PURCHASE REQUISITION FORM
Step 1: Ensure that you have enough money available in the proper program and line of your club budget to pay for the purchase. You may not make purchases that do not appear in your approved club budget.

Step 2: Download a Purchase Requisition form from the Student Life Website. Purchase Requisition forms can be found by clicking on the Club Resources section of the Student Life website.

Step 3: Secure your bids from vendors.

Step 4: Choose a vendor. Your choice does not have to be the lowest bid. You could choose a vendor with a higher bid due to better quality or quicker delivery, etc.

Step 5: Fill out the Bid Form. This can be found on the Club Resources section of the Student Life website.

Step 6: Fill out the Purchase Requisition form. Attach your bid information to the form.

Step 7: Bring completed Purchase Requisition form and attachments to the Office of Student Life.

Step 8: If approved, the Office of Student Life will contact you to pick-up your paperwork which should then be taken to the appropriate Student Government.

Purchasing Requirements

<table>
<thead>
<tr>
<th>Dollar Range</th>
<th>Forms</th>
<th>Comments</th>
</tr>
</thead>
</table>
| $250 or Less     | None (unless it is a contract) | • No bids  
|                  |                  | • No prior approval (unless it is a contract)  
|                  |                  | • No more than $2,000 to one vendor per month through this process |
| $250.01-$1,000   | Purchase Requisition | • 3 bids: Verbal & USG Bid Form  
|                  |                  | • Reasonable Price: Prior history or discount from retail price          |
| $1000.01-$2,500  | Purchase Requisition | • 3 bids: Written & USG Bid Form  
|                  |                  | • Reasonable Price: Prior history or discount from retail price          |
|                  |                  | • Approval from Director of Student Life & Baruch College Association Designee |
| $2,500.01-$20,000| Purchase Requisition | • 5 bids: Written & USG Bid Form  
|                  |                  | • Approval from Director of Student Life & Baruch College Association Designee |
| Over $20,000     | Formal Contract  | • Advertising and Formal Bid Process  
|                  |                  | • Approval from Director of Student Life & Baruch College Association Designee |

NOTE: Written bids must be obtained via information from vendors over the regular mail, printed emails, or by printed pages from the vendor websites. A response indicating no wish to bid is acceptable.
# HOW TO FILL OUT A PURCHASE REQUISITION FORM

## Purchase Requisition

<table>
<thead>
<tr>
<th>Item#</th>
<th>Description (Give Complete Specifications)</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Description of item(s) being purchased: include model numbers, if appropriate</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL AMOUNT:**

**Vendor**

**Requester**

**CONDITIONS:**
- No change may be made in any of the provisions of this purchase order without a written memorandum of change issued by the Bernard M. Baruch College Association, Inc.
- Submit invoices in triplicate to above address.
- Purchase order number must appear on each package and invoice.

**NOTICE:**
- The Bernard M. Baruch College Association, Inc. is NOT subject to NYS and Local Sales and Use Tax on purchases. NYS Form ST-19.1, Exempt Organization Certification, is available upon request.

**Signature of club president**

**Signature of club treasurer**

**FOR OFFICE USE**

**Receiver's Signature:**

**Signature of person receiving delivery**

**Total price of order**
**CONTRACTS**

All expenditures for personal services (speakers, musicians, DJs, performers, etc.) require a written contract. A contract is a legal document, which, upon its completion, binds the participants to the terms of the agreement. You must work with your Student Life Advisor when handling contracts. Under no circumstances should you be engaging in a contractual conversation with a vendor. Any contracts executed or signed by a student are against Baruch College policy and will be considered void.

There are different contracts depending on the types of service. Below is a brief description of each:

- **PERFORMANCE SERVICES AGREEMENT** is a contract used for a vendor who performs at an event such as a DJ, a band, musician, or dancer. A person who has an agent representing them would also fall under this category.

- **SERVICE AGREEMENT** is a contract used for a vendor who will be performing a service for the College. For instance, this person owns a smoothie business, offers salon services, will be setting up and operating lighting for a show, builds a stage set for a performance, etc.

- **HONORARIUM** is a contract used to pay a panelist or a speaker who is coming to your event. It should not be mistaken for a performance agreement. This person may be giving a lecture or offering insight to your audience on a particular topic. The honorarium is often a token of appreciation and should never amount to more than $2,000.

**PROCESSING A CONTRACT**

**Step 1:** Make sure that you have funds in the appropriate budget program line to pay for the contract. Remember you can move money between lines.

**Step 2:** Request a space to hold the event and meet with your Student Life Advisor to discuss the vendor you are looking to bring to campus or to perform the service. It is important that you have had this conversation with your Advisor prior to you speaking with potential vendors. This way you have accounted for any potential concerns that you may not have considered.

**Step 3:** Once the vendor had been approved by your Advisor, they will review all of the information and will put together a Baruch College Association approved contract using information from the vendor and language sanctioned by the Baruch College Association. This process takes time; please plan accordingly.

**Step 5:** When your contract has been approved, please provide the Purchase Requisition form, Payment Request Voucher, and a program flyer to your Advisor.

**Step 6:** The day after the performance of services, submit the completed Payment Request Voucher (with contract and flyer attached) to the appropriate Student Government for payment.

**Step 7:** If all of your paperwork is correct, the Student Services Accounting Unit will mail a check directly to the contractor in two (2) to three (3) weeks.
**SPECIAL CIRCUMSTANCES**
Contracts are complicated and many unusual circumstances can arise. The most common ones are listed below. In general, it is important to stay in close contact with your Student Life Advisor throughout the entire contract process until your vendor is paid.

**CONTRACT COSTS OVER $1,000**
Talk to a Student Life Advisor. You will need to get comparative bids before you proceed with this contract. You must submit the bids to the Office of Student Life who will be in consultation with the Dean of Students Office for approval.

**CONTRACTOR HAS HIS/HER OWN CONTRACT**
Have them forward your Advisor a copy of their contract. Speak with the Office of Student Life should the contractor insist on using their own contract.

**CONTRACTOR SENDS OVER ADDITIONAL DOCUMENTATION (E.G., “CONTRACT RIDER”)**
Bring any additional documents that the contractor sends to you to the Office of Student Life for review, even if you receive them after you have an approved contract.

**CONTRACTOR IS UNAVAILABLE TO SIGN THE CONTRACT UNTIL THE DATE OF THE PERFORMANCE**
If the contract has been completed (except for signature) and approved by the Office of Student Life prior to the event, then the contractor/performer may sign the contract on the date of the performance.

**CONTRACTOR WANTS TO BE PAID BY CHECK UPON THE COMPLETION OF SERVICES/PERFORMANCE**
It is recommended that the approved contract and pre-bill voucher must be submitted to:
- The Office of Student Life for approval at least three (3) weeks prior to the event.
- The appropriate Student Government at least two (2) weeks prior to the event.
- The Student Services Accounting Unit at least one (1) week prior to the event. The Student Services Accounting Unit must be notified that the check is needed on a specific date.
CLUB EVENT MANAGEMENT

It takes a lot of work, determination, and strategic thinking to be a successful club leader. Remember your Advisor is always an email, phone call, or visit away from helping you sort out any and all situations. A club leader must excel at the following:

- Budget and financial paperwork
- Event planning and related policies
- Building community within your membership

PROGRAMMING
Programming at Baruch College follows the Wellness Wheel Model (Hettler, 1976); this model focuses on students’ development in the areas of physical, emotional, and mental wellbeing. All dimensions relate to and affect each other. The Wellness Model provides a template for a balanced approach to event planning on campus. The six prongs of the wheel enable us to develop a strong community through both carefully planned programs and active interactions with each individual. Programs following this model should specifically and clearly follow, celebrate, expand, and practice the mission of your club. These are events that require considerable planning and teamwork. Speak with your Advisor for ideas and strategies when planning your programs using the Wellness Model.

The Office of Student Life staff is available to help you plan your club events and answer any questions regarding formalities and paperwork. Every aspect of your prospective event including facilities, entertainment, audio/visual needs, refreshments, and your budget will be discussed in great detail with you to ensure that your event will be a success.

HERITAGE MONTHS/WEEKS
Baruch College celebrates a number of heritage months:

- Latino History Month (September)
- LGBT History Month (October)
- Black History Month (February)
- Women’s History Month (March)
- Asian Pacific-American Heritage Month (April)
- Caribbean Week (April/May)

Planning for these months begins at least 3 months in advance. If your club wishes to sponsor a program during a heritage month/week contact your Student Life Advisor immediately. They will be able to connect you with the Chair of the Heritage Month planning committee so that you can plan a successful event.
HIGH RISK OR INAPPROPRIATE EVENTS
The Office of Student Life reserves the right to cancel or revise any event that may be deemed high risk or inappropriate such as physical events or drinking games.

MANAGING YOUR EVENT
After you have completed the initial planning for your event, there are still many management tasks to accomplish in order for the event to actually happen—things to handle before the event, guidelines to follow on the day of the event, and important details to take care of after the event. You may find it helpful to create a checklist. Here are some important things to remember when managing your club event:

BEFORE THE EVENT
Confirm all room and equipment reservations
In order to have a successful event, make sure that all of your club members are informed of all the guidelines that apply to your event (e.g., security procedures, room rules, alcohol procedures). If you delegate tasks to other club members, remember to follow-up and make sure that all details are in order (e.g., room/equipment reservations, publicity, food orders and deliveries).

Advertise adequately
If no one knows about the event, no one will come. Be creative, do something original to market your event. There are many resources and methods available to you for promoting your club event. Plan ahead as many resources have deadlines for submitting advertising. The Office of Student Life must be notified of any club event that is being advertised outside of the College. All flyers, posters, newspaper or radio ads directed to the general public must be approved by the Office of Student Life.

Alternative methods of publicity:
• Tables can be reserved for promotional activities.
• To advertise your event on WBMB Radio (Campus Radio Station), have an officer from your club or organization contact a representative from WBMB: (646) 312-4720, NVC 3-280.
• To purchase advertising space in The Ticker (Campus Newspaper), have a representative from your club or organization contact a staff member at (646) 312-4710, NVC 3-290.
• The Office of Student Life maintains an electronic video display in the 55 Lexington Avenue Building. To have your club event appear on the monitor, submit complete event information to the Office of Student Life by Wednesday of the week preceding the event.

Notify vendors/performers of campus procedures
• Food deliveries: As with the daily security policy, students will have to meet food delivery people in the building lobbies in order to receive food for a club event. Bring any payment(s) necessary and additional student help when picking up food deliveries in the lobby.
• Band or DJ equipment arrival and departure: You must schedule a time with your Advisor to use the loading dock; parking is not guaranteed. Newman Vertical Campus - 24th Street. Mason Hall - 22nd Street.

Guests
The Guest List form is available on the Office of Student Life’s website. You must submit a list of names, in alphabetical order by last name, directly to the Office of Student Life three (3) business days before your event. The Office of Student Life will approve and forward the guest list to the Security desk for use during your event. Note: This procedure includes all guest speakers.
Security meeting

Security for a College event, held on College premises, is under the control and supervision of Baruch College’s Public Safety Department. The President of Baruch College through his/her designee, the Director of Security, must approve any special security arrangements in advance. All large events require a Public Safety assessment as a condition of approval to determine the number of Public Safety officers necessary. Any club or organization planning to use the Public Safety officers must allocate sufficient financial resources to pay for the appropriate number of public safety officers.

If your event requires the use of College Public Safety officers, you must attend a meeting with the Office of Student Life and the Public Safety Department to review the security procedures for your event. The meeting will occur 1 to 2 weeks prior to your event; the Office of Student Life will schedule the meeting and notify you of the day and time.

ON THE DAY OF THE EVENT

Arrive early
No matter how well you plan an event, sometimes difficulties arise. Most can be resolved if they are discovered in time. Make sure to check the room, the set-up, the equipment, the decorations, the food, etc. in advance. If there is a problem, contact the Office of Student Life for assistance.

Plan accordingly
All events must end at the stated time, whether or not they started on time. Event end times may not be extended.

Clean-up
At the end of the event, club members must remove all trash from the facility. Leave the room looking in as good a condition as you found it.

AFTER THE EVENT

Pay your bills
Submit all remaining Payment Request Vouchers for your event (e.g., contracts, last-minute purchases) to the appropriate Student Government treasurer on the first business day after the event. Do not submit uncompleted paperwork.

Evaluate
Great leaders are constantly learning from their experiences. Evaluating your event after it is over is the key to planning successful events in the future. Take time to think about your event: What went well? What would you do differently? What would you like to remember for next time? Review the event at your next club meeting. Ask club members for their feedback. Make notes and refer to them during your next event or pass them along to the next leaders. If you want help in learning to assess an event, please ask your Advisor!
SAMPLE EVENT PLANNING TIMELINE

4-6 Weeks Out
Meet with Advisor to plan your event.

4 Weeks Out
Confirm Logistics:
Secure a room, speakers, contracts and payment paperwork.

2-3 Weeks Out
Setup and Outline the event plans.

1 Week Out
Attend security meeting with Advisor and Public Safety.

The Day Before
Finalize and confirm all staffing and logistics.
POLICIES AND PROCEDURES

PLANNING AN OFF-CAMPUS EVENT
A club event may be held off-campus utilizing student activity fees only with the permission of the Office of Student Life and the Dean of Students Office. Your Advisor will guide you through this process which will require a thorough off-campus trip proposal including details of the proposed event and rationale for hosting it off-campus. Once you have met with your Advisor, the Office of Student Life will submit the proposal to the Dean of Students Office. If approved, all travel participants must complete an Off-Campus Student Travel Waiver Form that must be filed with the Office of Student Life at least seven (7) business days prior to the trip departure.

Your proposal must be submitted to your Student Life Advisor at least ten (10) weeks before an event and six (6) months before an international trip. Funding must be available in your budget when you submit the request.

FACTORS THAT MAY BE CONSIDERED WHEN APPROVING AN OFF-CAMPUS EVENT:

• The availability of suitable campus facilities
• The proximity of the off-campus location to the campus
• Day and time of the event
• The ease of access that students will have to attend the event
• The expected number of attendees
• The adequacy of security coverage at the location
• The amount of liability insurance coverage necessary
• Note: For off-campus events, the College requires that the location must carry insurance and provide proof thereof. Additionally the location must also name the Baruch College Association as additionally insured. If the location carries no liability insurance, then your club will be required to pay for such insurance from its own funds as a condition of holding an off-campus event.

TRAVEL AND TRANSPORTATION EXPENSES
Transportation and travel expenses in connection with authorized programs are reimbursable if properly budgeted for, or if sufficient miscellaneous funds are available. Use the following guidelines for managing your club’s travel expenses:

• Whenever possible, use the least expensive mode of public transportation. Use of personal vehicles is not permitted.
• All travel requiring overnight accommodation is subject to the prior approval of the Office of Student Life.
• New York State Comptroller’s Office travel regulations, which are applicable to Baruch College, permit meal allowances for breakfast and dinner. Receipts for meals are required in order to receive reimbursement.

VACATION TRAVEL PROGRAMS (E.G., INTERSESSION OR SPRING BREAK GROUP TRIPS)

• Sponsoring student organizations must work with a bonded travel agent. The travel agent must provide an indemnity clause that will insure that if any problem arises and the College or the organization is sued, the agency will assume all liability and defend themselves and the College.
• All publicity connected with the event, including the travel agent’s brochure, must include a disclaimer in bold, clear print, of equal size to the name of the sponsoring organization, which states: “This trip is
not sponsored or administered by Baruch College, and therefore the College has no responsibility or liability with respect to this trip whatsoever.” No students should be given a free trip or a percentage of reservations. Any money that may be offered by the agency should be paid by check, made payable to the sponsoring organization and not to any individual student.

- Students should not collect any money. All money should go directly to the travel agent.

**ALCOHOL**

Baruch College regulations governing student conduct permit the use of alcoholic beverages on campus only at “duly authorized social functions.” The Office of Student Life must approve these social events at least 21 business days in advance, and events must be co-sponsored by USG or GSA. Alcohol events may be limited to one per month. Failure to adhere to these established guidelines may result in disciplinary action and/or termination of organization funding, suspension of future programming, etc. Additional details regarding Baruch College’s alcohol policy may also be noted in the Baruch College Code of Student Conduct located in the Student Bulletin on the College’s website.

**IMPORTANT NOTES**

- The New York State Alcoholic Beverage Control Law prohibits the sale or distribution of alcoholic beverages to people under the age of 21.
- When alcohol is being served, the proportion of food, snacks, and non-alcoholic beverages shall be of a sufficient amount and variety, commensurate with that of the alcohol.
- Alcohol is defined as wine and beer only.
- Marketing and/or advertisement of alcohol or alcohol-related activities at College events is prohibited. For example, flyers announcing beer pong, kamikaze night, keg party, drink specials and/or games, all you can drink, etc., are not allowed.
- Only a licensed vendor may serve alcohol. The Office of Student Life must approve the vendor.
- The licensed vendor must follow the Baruch College Campus Policy on Alcoholic Beverages. A copy of this policy is available in the Office of Student Life.
- There is a maximum limit of two (2) drinks per student.
- Alcohol consumption will be confined to a designated alcohol service area. This space must be specifically designated for those that are 21 years or older. Alcohol will not be permitted to leave this area.
- Valid forms of ID might be a valid driver’s license, NYS ID, or a valid government-issued photo ID.
- Staff, ID checkers, and bartenders at events may refuse entry or service to individuals who appear intoxicated.
- A security meeting with Public Safety must be coordinated at least two weeks prior to the event.

**ALCOHOL PERMITS**

1. Details of the event must be submitted in writing to the organization’s Advisor at least three (3) weeks prior to the event. This includes:
   - Setting up an appointment with your Advisor to discuss the planning of this event.
   - A complete room request reservation.
   - A signed alcohol permit form.

   Depending on the size of the event, the sponsoring clubs and/or organizations must have a minimum of at least three (3) club members to serve as coordinators. These members must be present during the event and will assist Student Life staff in managing the event. They may not consume alcohol during this event. All members of the event organizing committee must attend a meeting with Student Life and Public Safety prior to the event to ensure familiarity with Baruch College security policies and procedures.
2. Student Affairs professional staff must be available and present during the event. Thus staff availability must be confirmed prior to the event.

*All unconsumed alcohol will be removed by the Office of Student Life and disposed of accordingly. The improper use of alcoholic beverages at your club event could result in the loss of all club privileges for your group. Violations of alcohol policies and procedures will result in disciplinary action.

In all instances, the Office of Student Life adheres to the Baruch College “Campus Policy on Alcoholic Beverages” issued by Baruch College Legal Counsel. A copy of this policy is available in the Office of Student Life.

**GUEST ACCESS**

- Guest lists must be submitted to your Advisor at least 72 hours before an event.
- Baruch students should escort their guests (non-Baruch students) into the building.
- Unescorted guests must appear on a pre-approved guest list. All guests must present photo identification in order to be signed in at the door.
- Baruch student and guest IDs will be checked at the event entrance. A Public Safety officer will sign in guests.
- Anyone entering night events may have to pass through a metal detector. Public Safety will confiscate all weapons and alcohol.
- Public Safety may refuse entry to students and/or guests should maximum capacity be reached at the designated event venue.
- All guest lists must be submitted to the Office of Student Life at least three (3) business days in advance of your event. Student Activity Fee money should be used for the benefit of Baruch students. Therefore, only 10% of event participants may be outside guests. Alumni are considered outside guests. The 10% policy does not apply to ticketed events or shows in Baruch Performing Arts Center spaces. The Office of Student Life may consider exceptions on a case-by-case basis.

**ALUMNI ACCESS AND PARTICIPATION**

The Office of Student Life recognizes the benefit of Alumni participation in clubs and organizations at Baruch College. It is imperative that these alumni fall within the outlined policy to ensure the safety, integrity, and proper allocation of resources within the clubs and organizations.

- Alumni must have maintained active status in the club or organization during their time at Baruch and must have graduated from Baruch College.
- Student Activities fees are not to be spent on alumni members.
- Alumni will be considered outside guests (please refer to page 26).
- Participation in the club is to be in a mentorship capacity.
- Club executive boards must submit a proposal regarding the role of alumni mentors and benefits of alumni participation.
- Alumni who graduated from Baruch College more than five (5) years ago can no longer participate in the day-to-day activities of the clubs.
- Alumni may not fundraise on behalf of the club or organization.
- An alumni ID must be carried at all times when present at club or organization functions.
- Alumni must sign “Alumni Mentor” Agreement forms should they participate in clubs engaging in high risk activities.
STORAGE OF ITEMS FOR AN EVENT

Any items ordered or rented for a club/organization event may not be stored at the College. The College and all related entities that operate in conjunction with Baruch College cannot be held liable in the event of damage, loss, or theft of these items.

RAFFLES AND GIVEAWAYS

The use of Student Activity Fee money for raffle prizes and giveaways is highly discouraged but not prohibited. Club leaders should think strategically about the purpose of the item and how much it costs in relationship to the total event cost. Student activity fee money should benefit as many Baruch students as possible rather than a select few.

• Raffle prizes and giveaways cost should not exceed $299. Exceptions may apply.
• If the raffle prize and/or giveaway has been purchased through Student Activity Fee money then the recipient of the prize must be a registered Baruch College student.
• All winners must provide CUNY ID number, Baruch ID, and name in order to receive the prize.
• All raffles and giveaways must receive prior approval from Student Life. Raffles and giveaways purchased prior to approval will not be reimbursed.
• Members of the club that purchased the giveaway cannot win the giveaway.

RAFFLES

• Any money collected via a raffle up to the full value of the item purchased, including those bought with suggested donations, must be returned to the club budget prior to any donations being made to a charity.
• A minimum $1 value must be applied to a raffle ticket even if it is suggested donation.

FUNDRAISING GUIDELINES

The Office of Student Life must approve all fundraising activities/events (including events that utilize “suggested donations”) in advance.

Step 1: Meet with your Advisor at least three (3) weeks prior to the activity and submit a proposal outlining your fundraising plan.

Step 2: After the activity/event, all proceeds must be deposited with the Student Services Accounting Unit within 24 hours of the completion of the event. The money that you raised (if applicable) will be used first to reimburse all expenses from your club budget; then any profit will be deposited in a private account in the Student Services Accounting Unit. The “profit” must be donated to the charity.

Step 3: Obtain a W-9 form from the charitable organization. Attach the W-9 form to a Payment Request Voucher and submit to the Student Services Accounting Unit.

Step 4: Within 30 days of the end of the fundraiser, verification of receipt of donation must be made to the Office of Student Life. Verification may include the following:
• A copy of the receipt from Student Services Accounting Unit and a copy of a completed voucher made payable to the charitable organization.
• A letter/receipt from the charitable organization verifying the donation from the student club/organization.

WHERE TO GO FOR FUNDRAISING HELP

Once Student Life has approved your fundraising plan, work with your Advisor for assistance identifying fundraising prospects, writing letters of solicitation, development of sponsorship plans, etc. Your Advisor will be able to connect you with the appropriate resource at the College.
TYPES OF FUNDRAISING AND OTHER CHARITABLE ACTIVITIES

Bake Sales
- Secure a table from the Office of Student Life at least three (3) weeks in advance.
- A licensed commercial kitchen must prepare hot food items distributed or sold at tabling locations. All goods must be individually pre-packaged.
- The use of Sternos and electric cookware (e.g., blenders) is not permitted in the lobby.

Corporate Fundraising
At any given time, the Office of College Advancement (OCA), which is responsible for the College’s institutional and individual fundraising activities, is in discussion and negotiation with many companies on the College’s behalf. They can be helpful to you in approaching external organizations in your efforts. Fundraising within the CUNY system must follow CUNY, state, and federal tax policies.
- Only student club members in a registered organization can solicit funds from corporations or other organizations on behalf of a club.
- Students who want to go to corporations to make requests for funds to support student club activities must receive approval from Student Life in conjunction with the Office of College Advancement (unless they are receiving only in-kind gifts or club expense pickup by the person/unit).
- Students who solicit donations are solely responsible for collecting any and all funds from corporate or other sponsors.
- Students may solicit corporations for funds for club activities only, such as conference sponsorships, alumni receptions, social events, and other College-approved social and career-related events. (Due to IRS and CUNY legal and tax regulations, scholarships, club endowments, paid internships, research grants, or awards for student performance may only be solicited through College Advancement.)

Sales of Other Items (e.g., raffle tickets, bracelets, t-shirts)
- All items must be ordered and sent to the Student Services Accounting Unit prior to the fundraiser event.
- Raffle tickets must be registered with the Student Services Accounting Unit.
- You must designate, in writing, the names and CUNY ID numbers of the student club members who are authorized to sell items.
- Each seller will sign for a block of items at the Student Services Accounting Unit.
- After the event, each seller must return all cash collected and unsold items to the Student Services Accounting Unit.
- The cost of the prize should not exceed $299. Sometimes, prizes are donated by an external organization. These prizes may exceed $299. Note that a prize given away in a raffle that exceeds $600.00 requires the winner to fill out a W-9 and have their CUNY ID number recorded. The Baruch College Association notifies the IRS of all gifts beyond $600, which means the winner will have to report the prize as income.

Selling Tickets for a Fundraising Club Event
If tickets are sold at a “suggested donation”, tickets must state suggested donation monetary value, as the price on the front of the ticket. The ticket must also include the name of the charity. If a Baruch student wishes to attend the event but does not wish to give a suggested donation, the ticket must be given free of charge. Events organized through Student Activity Fees must primarily benefit the Baruch student body.

Donations Drives (e.g., clothing, food, toys)
- Drives may only last one (1) week.
- The club is responsible for decorating bins in order to advertise the charitable activity and identify the bins as donation sites.
• The 2nd Floor atrium in the Newman Vertical Campus is not considered a storage space for drives. Bins must be removed by 8pm every day.

• If the drive is scheduled to run for more than one (1) day, you will need to identify a location for storing the collected donations until they can be delivered to the designated charitable organization.

• It is the club’s responsibility to determine how collected donations will be transported to the recipient charitable organization.

• If the charitable organization agrees to pick up donations from the College:
  o Make sure to notify the Office of Student Life ahead of time regarding the date and time of the pick-up, and the name of the organization’s representative.
  o If a member of your club does not plan to be present at the time of pick-up, instruct the representative to check in at the Office of Student Life upon his/her arrival.

**PURCHASE OF EQUIPMENT, SUPPLIES OR MATERIAL ITEMS**

Student Activity Fees cannot be used to purchase equipment, supplies, or materials related to student events without prior discussion and written permission from the Office of Student Life. Items that can be consistently used from year to year for annual events, the feasibility of long term storage, long term practicality of items and whether the purchase is an effective use of Student Activity Fees are some factors to be considered before approval may be given.

Examples of items that will not be approved include, but are not limited to, the following:

• Clothing of any kind worn for events that include costume, fashion shows etc.

• Uniforms

Items that are approved for purchase will be inventoried by the Office of Student Life and properly logged and placed in a secure location at the close of each academic semester. The items can be checked out with the Office of Student Life at the start of the semester after the club/organization has followed the appropriate club registration process.

**REPORTING MISSING OR LOST EQUIPMENT**

Should your organization experience the loss or theft of any equipment that may have been purchased from funds from your club’s student activities budget (past or present), immediately follow these procedures:

• Contact the Baruch College Security Office, NVC 1st Floor (646-312-4880), and report the loss.

• Submit a written report to Baruch College Security and the Office of Student Life.

**TICKETING FOR EVENTS**

All club events with ticket sales require approval from Student Government and the Office of Student Life. Approval is required for printing and selling/distributing tickets. Tickets must be registered with the Student Services Accounting Unit at least seven (7) days prior to the event.

• Large club shows require the sale or distribution of tickets. Exceptions may apply.

• Any ticketed event that anticipates more than 35% of the attendees will be non-Baruch students (eg. Mason Hall events) must charge for tickets and cannot “sell” tickets for a suggested donation.

• Tickets (including raffle tickets) used to collect suggested donations must still be registered with the Office of Student Life. A minimum “price” of at least $1 must be set on raffle tickets.
IMPORTANT

Step 1: Make sure that your club budget has enough money for all costs of the event, including costs to print tickets.

Step 2: Prepare and submit a written proposal for ticket sales to the appropriate Student Government and the Office of Student Life for approval at least four (4) weeks before the event.

Step 3: All tickets must be ordered by the Office of Student Life and will be deposited to the Student Services Accounting Unit on your behalf. Your club will be charged for the cost of printing the tickets. Allow two (2) to three (3) weeks to order and receive printed tickets.

Step 4: Printed tickets must include the following information:

- Name of the sponsors
- Name of the event
- Date, time, and place
- Ticket price
- A consecutive audit number, which must appear on both halves of the ticket (in order to permit tear stubs and auditing)
- Name of charitable organization, if applicable.

Step 5: Tickets for a club event must be sold and distributed in advance.

Step 6: Any tickets remaining after advance sales and distribution may be sold at the event if approved by the Student Services Accounting Unit and the Office of Student Life.

ADVANCES SALES DISTRIBUTION

- Tickets can be sold and/or distributed by club members or the Office of Student Life until two (2) days prior to the event.
- You must designate in writing to the Student Services Accounting Unit the names and CUNY ID numbers of the students/staff who are authorized to sell and/or distribute tickets for your club event.
- Each seller can sign for a block of tickets at the Student Services Accounting Unit, and must return all cash collected before picking up another block.
- All cash collected and unsold tickets must be returned to the Student Services Accounting Unit two (2) days prior to the event.

DOOR SALES

- Before door sales can be approved, all advance sale tickets and/or money must be turned in to the Student Services Accounting Unit.
- One club officer will be given responsibility for tickets sold at the door of the event.
- Tickets must be sold in a secure location away from the entrance to the event, to avoid crowding.
- The responsible club officer will return and count all cash collected and unsold tickets with the Student Services Accounting Unit no later than the close of the next business day after the event.
SIGNS FLYERS AND POSTERS

- Postings must be consistent with the principles and values espoused by Baruch College; the content of the postings must avoid demeaning or discriminatory portrayals of individuals or groups, cannot be libelous, violate copyright law, or contain any material that is inconsistent with the community standards of Baruch College.
- All signs, flyers, and posters should bear the following: [1] name of the sponsoring group(s); [2] admission policy; [3] date, time, and location of the event; [4] any special information applicable to the event (e.g., guest speakers), the serving of refreshments, etc.
- Signage noted in a different language should also be translated into English.
- Any posting not carrying a Baruch affiliation on it will be automatically removed.
- All postings that display an expired or past date will be automatically removed every Friday.
- Masking tape, clear Scotch tape, push pins and/or staples are the only materials allowed to attach postings on appropriate bulletin boards. The use of duct tape, glue, paste and/or “fun tack” is strictly prohibited.
- No postings are permitted on glass or painted surfaces (e.g. walls), doors, elevators, and inside restrooms.
- Failure to comply with any of the aforementioned requirements will result in the loss of posting privileges for your club or organization.

HANGING OF BANNERS

- Clubs and organizations wishing to hang official banners must comply with the following requirements:
  o All banners must be no longer than 5 feet wide and not exceed 3 feet in height.
  o All banners must be official banners made of vinyl with perforated holes at the corners in order to loop string/rope through.
- Banners are only permitted to hang off the 3rd Floor railing (directly above the 2nd Floor atrium) upon availability of space.
- Student clubs and organizations wishing to hang banners must receive approval from the Office of Student Life.
- Banner space is extremely limited and thus should be requested at an early date. Banner-hanging requests can be made as early as the first week of the semester. Space will be allocated according to the date in which the club/organization receives approval from the Office of Student Life.
- Banners are only permitted to hang on the day when the scheduled event is being held and must be removed once the event has ended.
- If approved by your Advisor, the Office of Student Life will be responsible for hanging and removing all banners.
- Failure to comply with any of the aforementioned requirements will result in the loss of banner-hanging privileges for your club or organization.
FILMS, EQUIPMENT AND RECORDING EVENTS

AUDIO OR VIDEO RECORDING OF EVENTS
Federal copyright laws protect individual performers, artists or speakers from having their work copied without their express authorization. Audio or video recording of an event is permissible with the verbal or written consent of a performer, speaker or artist. In the event that a performer or speaker does not wish to be tape recorded, a statement prohibiting the use of audio or video recording and/or the taking of photographs should be included in all publicity for your event and a sign should be prominently posted at all entrances to your event (“Video or Audio Taping is Prohibited”). Any guests attending the event with cameras and/or recorders will be asked to remove them. In all instances, appropriate permission must be sought through the Baruch College Office of Communication & Marketing if the intention is to use the Baruch College name and/or the College’s logo or brand.

OFFICIAL USE AND REMOVAL OF COLLEGE ASSOCIATION EQUIPMENT
CUNY guidelines require that records be maintained of individuals and organizations responsible for, and in possession of, equipment purchased with Student Activity Fees. The official use of club or organization equipment must be approved prior to its removal from your organization’s office. This includes the use of cameras, tape recorders, stereos, etc. Please contact the Office of Student Life for an Equipment Loan and Removal Authorization form. Any equipment borrowed must be returned by the expiration date of the authorization. A borrower agrees that in exchange for the authorization to use the equipment, he or she assumes the responsibility for its loss and replacement. CUNY guidelines provide that a student who fails to return any equipment shall be treated as being delinquent or in default and shall be barred from class registration and from receiving a transcript or degree until a proper accounting or restitution is made.

FILM SCREENINGS
The owners of the distribution rights of a film must license film screenings, regardless of whether or not admission is charged. The license for display varies depending upon the film. Films rented from Netflix, Redbox, or other rental services are for personal and private use only and any public display of the film is a violation of United States Copyright Laws and is punishable by a fine and/or imprisonment. Therefore, if you do not have the license to screen the film then you are not permitted to advertise or screen the film at a campus event. Only officially licensed films should be advertised on campus. The Office of Student Life will not confirm space for a film screening unless you have the documentation proving the license or permission of the distributor for a public screening of the film.
Appendix A: Fiscal Guidelines for the Expenditure of Student Activity Fees

INTRODUCTION
1. Section 16.2 of the bylaws of the Board of Trustees of The City University states: “Student activity fee funds shall be allocated and expended only for the following purposes:
   a. Extracurricular educational programs,
   b. Cultural and social activities,
   c. Recreational and athletic programs,
   d. Student government,
   e. Publications and other media,
   f. Assistance to registered student organizations,
   g. Community service programs,
   h. Enhancement of the college and university environment,
   i. Transportation, administration and insurance related to the implementation of these activities,
   j. Student services to supplement or add to those provided by the university and,
   k. Stipends to student leaders.

   In accord with Section 16.4 of the bylaws, Student activity fees may support activities provided:
   a. that such activity is for the direct benefit of students enrolled at the college,
   b. that participation in the activity and the benefit thereof is available to all students enrolled in the college and,
   c. that the activity does not contravene the laws of the city, state or nation, or the published rules, regulations, and orders of the university or the college.

2. The Bernard M. Baruch College Association, Inc. ("the Association") is a non-profit corporation, chartered under the laws of the State of New York and the bylaws of the Board of Trustees of The City University of New York. It exists for the purpose of receiving student activity fees and reviewing and approving annual allocations and expenditures of those fees. The duties of the Association include the establishment and oversight of procedures for the receipt, allocation and expenditure of student activity funds, as well as real or personal property, to affect the objectives as set forth above. The ultimate responsibility for the property, affairs, and concerns of the Association rests in the Board of Directors. The operating boards of the Association consist of the Athletic Board, Communications Board, Student Center Board, Undergraduate Student Government, and Graduate Student Assembly.
BUDGET PROCEDURES

1. *Estimate of Funds Available.* The allocating body and each operating board shall receive an estimate of total revenues, including any carry over balances from the prior fiscal year available for use in the forthcoming fiscal year, from the Treasurer of the Association.

2. *Requests for Budget Submissions.* The appropriate allocating body or operating board shall request that each organization or other interested individual submit a program/line budget.
   a. Detailed instructions and budget forms shall be sent by the allocating body or appropriate operating body to each appropriate campus organization and/or interested individual by both campus and U.S. mail to the last known Treasurer of each organization. These instructions shall include a calendar which will provide dates by which the budget must be submitted during the Spring semester, dates for budget hearings, and a list of the accounts or budget category lines, as well as information on appeals procedures and all appropriate deadlines. Copies of these instructions shall be filed with the Secretary of the Board of Directors of the Association.
   b. Student Organization Budget Requests. The following information shall be provided by student organizations requesting funds as appropriate:
      1. Organization name,
      2. Officers’ names,
      3. Size of membership,
      4. Purposes of the organization,
      5. Other sources of funds, if any,
      6. Requested budget allocation by program and line items. The following budget lines are to be used as appropriate in the budget request:
         i. Contractual Services: speakers, performers, DJ’s, rentals, security charges, etc.
         ii. Food and refreshments.
         iii. Supplies: flyers, posters, office supplies, advertising, promotion, etc.
         iv. Equipment: tangible items with a useful life of at least a year.
         v. Miscellaneous: requests in excess of $100 in this category for student clubs and organizations require additional specificity (i.e.: transportation $100, postage $250, etc.)
   c. Student Government Budget Requests. The executive of each student assembly shall present a budget request to the appropriate Assembly for its approval. The budget request should utilize the following budget lines as appropriate:
      1. Contractual Services: Events,
      2. Equipment,
      3. Food and refreshments,
      4. Personnel,
      5. Supplies and,
      6. Miscellaneous requests in excess of $500 in this category require additional specificity.
   d. Student Media Budget Requests. The officers of each student media (newspapers and radio station) shall present a budget request to the Communications Board for its approval. The budget request should utilize the following budget lines as appropriate:
      1. Contractual Services,
      2. Equipment,
      3. Printing,
      4. Telephone,
      5. Personnel,
      6. Advertising and Promotion,
      7. Food,
8. Supplies and,  
9. Miscellaneous: requests in excess of $100 in this category require specificity [i.e. postage, maintenance contracts, transportation, etc.]

3. **Budget Hearings.** After initial program budgets are submitted by organizations and interested individuals, the operating board or allocating body shall conduct hearings with each organization or interested individual during the spring semester.

4. **Budget Allocations.** The allocating body shall make a budget allocation for the forthcoming fiscal year to each organization or individual. The allocating body will notify each organization or individual of said allocation before the close of the spring semester. Operating Boards will forward a budget request to the College Association Budget Committee for its consideration. The Budget Committee shall develop a budget for the approval of the Board of Directors of the Bernard M. Baruch College Association, at its final meeting of the spring semester. The College Association may approve the budget or reject all or parts of it which it deems inappropriate, improper, or inequitable. If the budget is rejected, it is returned to the Budget Committee for further deliberation and re-submittal to the College Association. If the budget is not approved within 30 days, those portions of the budget voted upon and approved by the College Association board will be allocated. The remainder shall be held until the College Association and the Budget Committee agree. Once approved, these budgets may be expended according to the procedures and calendars of the allocating body and these guidelines.

5. **Revised Program Budgets.** Each organization or individual shall be permitted to resubmit a revised program budget on a line-by-line basis, based upon their final total allocation, to the appropriate allocating body for modification, by the end of the 5th week of the fall semester. Any resubmitted line budgets shall be reviewed by the appropriate allocating body. The allocating body must approve any resubmitted budget no later than the end of the 8th week of the fall semester.

6. **Budget Modifications.** Modifications of final budgets during the course of the fiscal year may be made by the appropriate allocating body subject to these guidelines and such rules and procedures that the allocating body may establish. No modifications shall be approved after April 15th.

7. **College President’s Review Authority.** In accordance with Section 16.11 [b] of the bylaws of the City University, the President of the college shall have the authority to suspend and send back for further review any student activity fee, including student government fee, allocation or expenditure, which in his or her opinion is not within the expenditure categories defined in section 16.2 of the bylaws. The College Association shall, within ten days of receiving a proposed allocation or expenditure for further review, study it and make a recommendation to the President with respect to it. The College President shall thereafter consider the recommendation, shall consult with the General Counsel and Vice Chancellor for legal affairs, and thereafter communicate his/her final decision to the allocating body as to whether the allocation or expenditure is disapproved.

**Budget Guidelines**

1. **Officer Responsibility for Expenditures.** Officers must be familiar with the applicable fiscal guidelines, rules and regulations of the Bernard M. Baruch College Association, Inc. All Officers with signature authority agree to be held responsible for all budgets, purchase requisitions, contracts, payment requests, etc. An organization which makes expenditures not within its approved budget may jeopardize future funding as well as subject its officers to discipline procedures.

2. **Budgets.** Budget requests must contain a detailed explanation as to how the monies will be expended. The budget should detail the proposed expenditures by program and budget line categories.
3. **Budget Modifications and Transfers.** An organization or individual may petition the appropriate allocating body for a budget modification if such a change is necessary. Transfers may be made between lines or within existing programs up to 10% of the total allocated budget with the approval of a designated representative of the allocating body. A denial of such a transfer may be appealed to the allocating body. Transfers in excess of 10% must be presented to the allocating body for its approval.

4. **New Programs Not Specified in Budgets.** The allocating body must approve new programs that have not been specified in the resubmitted budget at least two weeks prior to the scheduled event.

5. **Fall Semester Expenditures Not to Exceed 50% of Budget.** No more than 50% of the total amount of funds allocated in an annual budget may be spent or committed during the fall semester. In the event that fee and/or income collections fall short of those estimated, budget revisions must be made prior to actual expenditures for the spring semester.

6. **Payment for Services.** No Baruch College faculty member or administrator shall be paid for services rendered to an organization. Student officers shall not be paid for services rendered to their own organization except as herein provided under paragraph 7.

7. **Stipends.** Stipends may be paid for services performed by currently enrolled students in accordance with a line item budget approved by the allocating body. Examples of such student services include such functions as an elected officer of the College Association or student government, editor of a student newspaper, or president of a student organization. Payment shall not be measured by hours devoted to the performance of the position, but shall be issued only in accordance with the policies of the Board of Trustees of the City University. Stipend payments to student leaders are limited to a maximum of two (2) years; except that a student who receives two years of stipend payments as an undergraduate, shall be permitted a third year of stipend payments as a graduate student. Student leaders shall be limited to maximum stipend of $4,490 per year effective July 1, 2012, or no more than $2,245 per semester effective July 1, 2012. The exact amount to be determined by the allocating body, however no more than 12% of a total student assembly budget, nor more than 35% of the prior fiscal year’s advertising revenue of a publication, may be utilized for stipends. A student may not receive more than one stipend for the same time period, or be an employee of, or receive any other compensation from, a student activity fee allocating body. In addition, the Chairperson of the University Student Senate shall be limited to a maximum of $9,752 per year effective July 1, 2012 and no more than $4,876 per semester effective July 1, 2012. Furthermore, Vice-chairpersons of the University Student Senate shall be limited to a maximum of $5,686 per year effective July 1, and no more than $2,843 per semester effective July 1, 2012. All rules and regulations regarding stipends, including but not limited to maximum limits shall be in accord with guidelines adopted by the Board of Trustees of the City University.

8. **Employment of Personnel.** Personnel may be employed only if specific funds for this purpose have been approved through the normal budget allocation procedures. Whenever appropriate, consideration should be given to the employment of students. The rate of pay for the hours employed will be approved by the allocating body and must be consistent with College pay scales. Additionally, the budget line must include all appropriate fringe benefits and/or payroll taxes. All paid positions must be advertised in appropriate media.

9. **Open Programs; On and Off-Campus Events.** All programs and events receiving student activity fees must be open to the entire Baruch community and must be appropriately publicized and held on campus. An event may be held off-campus utilizing student activity fees only at the discretion of the Dean of Students, or designees, which must be requested at least six (6) weeks prior to the event. Such permission will be granted based upon the merits of each request. Details for Baruch College may be reviewed on page 25 of this handbook. Consideration will be given to:
   a. The availability of suitable campus facilities,
b. The proximity of the off campus location to the availability of suitable campus facilities,
c. The proximity of the off-campus location to the campus,
d. The day and time of the event,
e. The ease of access that students will have to attend the event,
f. The expected number of attendees,
g. The adequacy of security guard coverage at the location,
h. The amount of liability insurance coverage necessary.

10. **Equipment Purchases.** Any equipment purchased by any organization, individual, or allocating body, regardless of the source of funds, is the property of the College Association, and may be utilized for whatever purposes deemed appropriate by the Board of Directors. The purchase of equipment must be made in accordance with these guidelines. All equipment must be appropriately secured when not being utilized. Review pg. 29 of this handbook.

11. **Travel, Transportation and Meal Expenses.** Transportation, travel, and meal expenses in connection with authorized programs, conferences, conventions, meetings, or in the performance of official business, are reimbursable if properly budgeted for, or if sufficient miscellaneous funds are available. Prior approval must be sought in accordance with the nature and amount of the expenditure as provided within these guidelines. Transportation, travel and meal requests must include a statement of the type, destination and purpose of the expense incurred. Overnight accommodations must avoid any excessive and unreasonable expense in accordance with NYS travel guidelines. Whenever possible, the least expensive mode of public transportation should be utilized. Use of personal vehicles is permitted with prior approval, and will be reimbursed at a rate in accordance with NYS Travel Reimbursement guidelines, only when suitable public transportation is unavailable. Meals (breakfast and dinner, but not lunch) may be reimbursed to a maximum of $8 for breakfast, and a maximum of $34 for dinner per person. Receipts for meals are required. All travel entailing overnight accommodations is subject to the prior approval of the Dean of Students office in conjunction with the Office of Student Life. See page 25 for details.

**Expenditure Procedures**

1. **Budgeted Expenditures.** Expenditures for items not specified in an approved budget may not be made.

2. **Purchases of $250 or less.** Purchases of $250 and less do not require prior approval, purchase requisitions, or bids. Every effort should be made to obtain the necessary goods and/or services at the most reasonable price. Such purchases should not be made to circumvent competition. The Baruch College Association, Inc. shall not issue more than $2,000 to any vendor during one calendar year.

3. **Purchase Requisitions for Purchases greater than $250, but less than $1,000.** Purchases greater than $250, but less than $1,000, require that three (3) vendors must be solicited. These three bids, on identical specifications, may be obtained verbally and summarized in a written signed statement attached to a purchase requisition. The purchase requisition must be submitted for approval to a staff member in the Office of Student Life, as representatives for the Baruch College Association, Inc., prior to the actual expenditure. If the purchase is from a vendor other than the lowest bidder, a memorandum of explanation for the reasons for the choice of that vendor must accompany the payment request form signed by two officers of the organization. Upon approval, a purchase order will be issued and is to be given to the successful bidder authorizing the purchase.

4. **Purchase Requisitions for Purchases greater than $1,000, but less than $2,500.** Purchases greater than $1,000, but less than $2,500, follows the same procedure as in paragraph 3, but must be reviewed by the Director of Student Life as a representative of the Baruch College Association, Inc.
5. **Purchases greater than $2,500 but less than $20,000.** Purchases of $2,500 and greater require informal written sealed responses which must be received by a specified date and time. Bid requests must be sent to at least five (5) vendors. A response indicating no wish to bid is acceptable. Approval by both the Director of Student Life and the Office of Student Affairs, are required as representatives of the Baruch College Association, Inc.

6. **Purchases greater than $20,000.** Purchases greater than $20,000 require a formal contract entered into after advertising and a formal competitive bidding process. The Vice President must review the bidding process and contracts for Student Development through his designee, the Associate Dean of Students, on behalf of the Baruch College Association, Inc.

7. **Payment Request Vouchers.** Payment request vouchers are distributed by the Student Services Accounting Unit to each allocating body and operating board. Student organizations may obtain payment request forms from the appropriate allocating body. A separate payment request form must be submitted for each payee. Purchase requisitions, original receipts, invoices, any necessary contracts, letters of prior approval, and a copy of the publicity for an event, must be attached to the payment request form upon submission to the appropriate operating board or allocating body.

8. **Signatures; Organization Registration.** Purchase requisitions and payment request forms must be signed by at least two (2) officers of the organization, who must be currently registered students at Baruch College, and listed on the organization’s registration and signature authorization cards filed with the Office of Student Life, the Student Services Accounting Unit, and the appropriate operating board or allocating body. No payments of any kind will be made unless the organization is registered with the appropriate Student Life Office, and signature authorization cards are on file in the Accounting Unit.

9. **Check Disbursements by Mail.** The Student Services Accounting Unit will mail checks approximately five (5) working days after submission of payment request forms by the appropriate allocating body to the Accounting Unit. If special circumstances require it, a request may be made by the appropriate officer to the Accounting Unit to receive a check personally.

10. **Food and Refreshments; Licensed Food Vendors.** Purchase requisitions for the purchase of food must be used as outlined above. Checks for the purchase of food and refreshments payable to a food vendor may be obtained prior to receipt of the purchase upon a timely submission of a payment request voucher, together with a purchase requisition and pre-bill itemizing the type, quantity, and price of the refreshments that have been ordered. Only licensed food vendors should be used. The Office of Student Life, only upon a showing of exceptional cause, will approve exceptions to the use of licensed food vendors in advance.

11. **Reimbursements.** Payment request forms should be made payable to a vendor. A student may advance up to $250 of his/her own monies for a permissible expenditure and seek reimbursement upon the submission of original receipts or invoices.

12. **Sales Tax Exemption.** The Bernard M. Baruch College Association, Inc. is exempt from NYS and NYC sales and use taxes. Sales tax will not be paid to any vendor or as a reimbursement on any purchase. Sales Tax Exemption certificates are available from the Student Services Accounting Unit.

13. **Expenditures for Personal Services; Contracts.** Expenditures for personal services [speakers, musicians, performers, etc.] require a written contract. Contract forms for personal services are available from the Office of Student Life. Contracts must be signed by the contractor prior to submission to the Office of Student Life for review and approval. Contracts shall not be deemed effective unless and until approved by the Office of Student Life. If the contract is not submitted for review prior to the event, and funds are not available in the appropriate budget lines, the contract shall
not be approved and any reserved space for the event may be cancelled. Following the appropriate approval, the contract together with a Payment Request form should be submitted to the appropriate allocating body for its approval. The allocating body will forward the payment request and contract to the accounting unit for subsequent payment. This contract process requires a minimum of three (3) weeks from original submission to payment.

14. **Personal Services Exceeding $1,000.** Personal services in excess of $1,000 must receive the additional prior approval by the Dean of Students, through their designee, three (3) weeks prior to the use of said services. Requests for such approval must include documentation evidencing that the cost of the personal services being provided is competitive with recent charges by the performer of those services.

15. **Non-Political Expenditures.** No funds, material, property or services funded by student activity fees may be used for any partisan or nonpartisan political activity or to further the election or defeat of any candidate for public or political party office.

16. **Honors and Awards.** No more than 10% of the total budget may be spent by an organization on honors and awards without advance approval of the allocating body.

17. **Revenues.** Section 16.7 of the City University bylaws provides that all revenues generated by student activities funded through student activity fees shall be subject to the control of the allocating body. The application of such revenues to the account of the income generating student organization shall require specific authorization of the allocating body or operating board.

18. **Deposits of Revenues; Organization Private Accounts**
   a. All revenues from events and organization dues, in accordance with the Fundraising Guidelines outlined below, must be deposited with the Student Services Accounting Unit in the organization’s “Private Account [A].” Monies on deposit in organization private accounts may be expended through the same payment request system utilized for student activity fees. The expenditure of these monies requires the two (2) authorized signatures of the organization and is to be expended on programs and projects within the academic year. An organization’s unspent private account funds shall revert to the appropriate allocating body or fund unallocated surplus upon the end of the fiscal year. Upon an organization’s dissolution, any funds on deposit in an organization’s private account [A] shall revert to the unallocated surplus of the appropriate allocating body or fund at the close of the fiscal year.
   b. Funds received from other outside sources [i.e., agencies, grants, etc.] earmarked for specific purposes [i.e., leadership development, national organization affiliate revenue, etc.] shall be deposited into the organization’s “Private Account [B]”. The expenditure of these monies requires the two authorized signatures of the organization and a signature of a representative of the Office of Student Affairs. Funds left on deposit in a private account [B], upon the dissolution of an organization, shall revert to a scholarship fund within the College Association.

19. **Student Organization Bank Savings/Checking Accounts.** No organization or individual shall maintain a bank savings or checking account in the organization’s name.

**FUNDRAISING GUIDELINES AND PROCEDURES**

1. **Written Form; Fund Raising Approvals.** Any organization that wishes to sponsor a fundraising program or project must submit a Charitable Activity Request form, which must include the method of fund raising and the distribution of said funds, to the Office of Student Life and the appropriate allocating body. All fund raising programs or projects must be approved by the allocating body and the Office of Student Life prior to commencing the project, copies of said approval will be forwarded to the Student Services Accounting Unit.
2. **Fund Raising Costs.** All costs of the program or project must be on deposit in the appropriate budget line or private account in the Student Services Accounting Unit prior to commencing the program or project.

3. **Auditing and Accounting Controls.** All fund raising projects must include appropriate auditing and accounting controls that will permit full disclosure of expenses, income and distribution of net proceeds. All monies, as collected, must be deposited to the credit of the sponsoring organization in a private account in the Student Services Accounting Unit. All deposits must be made no later than the next business day after the funds are collected.

4. **When student activity fee monies are utilized for program expenses.** Income equal to the student activity fee expenses must be deposited to the credit of the appropriate allocating body. Net proceeds [income after expenses are subtracted] may be donated to specifically recognized non-profit charitable organizations or may be retained by the group sponsoring the project as specified in the original fund raising proposal. The distribution of net proceeds, the proper crediting to appropriate allocating bodies and private accounts, must be completed within ten (10) business days of the close of the project or program.

5. **Expenditure of Private Account Monies.** Monies on deposit in student organization private accounts may be expended through the same payment request procedures utilized for student activity fees. Utilization of these funds is limited to programs and projects scheduled during the academic year in accordance with the Fiscal Guidelines of the College Association.

6. **Methods of Fundraising.**
   a. **Dues and Donations.** Club members may voluntarily pay minimal dues to the organization. A student cannot be denied membership to, or any benefits of, the group on the basis of an unwillingness or inability to pay dues. The appropriate Student Activities Office(s) must review a statement of the proposed voluntary dues structure. The organization’s treasurer must utilize a receipt book for dues collection and all dues, together with a copy of the collection record, must be deposited to the credit of the organization in a private account in the Student Services Accounting Unit.
   b. **Raffles.** The distribution and sale of raffle books and the deposit of revenues must be arranged with the Student Services Accounting Unit. Raffles must be conducted with a specific purpose intended. The purpose of the fund raising must be stated together with the cost, the prizes, and the name of the sponsoring organization on the face of the ticket. Tickets must be consecutively numbered. All prizes, or sufficient funds to purchase stated prizes, must be on deposit in the Student Services Accounting Unit prior to commencing raffle sales. Raffle tickets will be consigned to each seller by the Accounting Unit in blocks of up to 50 tickets. Sale of raffles in classrooms is prohibited. Raffle sales for the purpose of scholarship funds must receive prior approval from the Office of Student Affairs. The sponsoring organization and the individual raffle seller must account for all raffles and cash receipts.
   c. **Events Utilizing Ticket Sales/Distribution**
      1. A program which will include ticket sales and/or ticket distribution requires all of the costs of the program to be on deposit in appropriate budget lines in the Student Services Accounting Unit prior to the commencement of ticket sales. The sponsoring organization must request tickets to be ordered at least three weeks prior to the event. All tickets must include the following information on the face of the ticket and will be ordered by the Student Services Accounting Unit on behalf of the organization with the cost being charged to the sponsoring organization:
         - Name of Sponsoring Organization;
         - Name of the Event;
         - Date, Time, and Place of the Event;
         - Ticket Price;
- Seat Number [if applicable];
- A consecutive audit number that must appear on both halves of the ticket to permit tear stubs and auditing.

2. Box Office Sales/Distribution. Tickets may be sold and/or distributed through the student center ticket distribution system at the lobby reception desk. Tickets will be sold until two days prior to the event or a sellout takes place.

3. Individual Sales/Distribution. The sponsoring organization may designate, in writing to the Student Services Accounting Unit, the names and ID numbers of students who will be authorized to sell and/or distribute tickets. Each seller will be consigned a block of 50 tickets to sell. All cash and unsold tickets must be returned to the Accounting Unit two (2) days prior to the event.

4. Door Sales. Advance ticket sales are always more desirable, however, unsold tickets may be sold “at the door” the day of the event only by an officer of the sponsoring organization, provided that secured ticket locations, away from the main access to the function, can be set up. The Accounting Unit will issue the tickets to the officer and it is the officer’s financial responsibility to account for all unsold tickets and cash receipts to the Accounting Unit no later than the close of the next business day after the event.

5. At the conclusion of all ticket sales, cash collected plus remaining unsold tickets, if any, shall be returned to the student services accounting unit along with a reconciliation of tickets to be accounted for, tickets sold, and cash on hand, no later than the close of the next business day after the event.

d. Sales. Sales of food or other items on consignment will be permitted only in designated areas of the college. Receipts must be provided upon customer request. A policy statement on refunds or adjustments, where appropriate, must be posted. All monies collected from said sales must be deposited by the end of the business day in the Student Services Accounting Unit.
APPENDIX B: UNDERGRADUATE STUDENT GOVERNMENT

USG CONTACTS
The following individuals in USG will be your primary point-of-contact for several club-related aspects. Become familiar with them and reach out to them when you need assistance.

TREASURY
Before you can access your budget, you must contact USG Treasurer: Isabel Zhao at isbael.zhao@usgbaruch.com or at her office in NVC 3-271.

THE APPEALS COMMITTEE
The Appeals Committee works with clubs to review proposals for additional funding for their events, helping to make them as successful as possible. If you are interested in requesting an appeal, please contact the Chair, Ben Chatham, at ben.chatham@usgbaruch.com NVC 3-276

THE FINANCE COMMITTEE
The Finance committee is responsible for allocating clubs’ budgets each year. Be sure to contact the Chair, Salma Mohamed, by the new club budget deadline in the spring. salma.mohamed@usgbaruch.com NVC 3-278

CLUBS AND ORGANIZATIONS COMMITTEE
The Clubs and Organizations Committee is responsible for three important tasks: assessing all co-sponsorship requests from undergraduate organizations, holding individual club check-ins, and executing the annual Bernies’ Awards Ceremony. For any questions about the things listed before, contact the Chair, Sau Fong Lin, at saufong.lin@usgbaruch.com. NVC 3-279

PUBLIC RELATIONS
For information about featuring your organization’s event in USG’s monthly newsletter, please contact the Chair of Public Relations: Agata Poniatowski. agata.poniatowski@usgbaruch.com NVC 3-277

USG SPACES
The USG Conference Room (NVC 3-270) can be reserved for your club meetings. To reserve this space, please contact USG Secretary: Vivian Lau. vivian.lau@usgbaruch.com
The Appeals Committee serves the clubs and organizations of Baruch by processing and reviewing their requests for additional funding. Clubs may appeal for additional funding due to a host of reasons: additional food, a more expensive vendor, anything that causes costs to exceed what was allocated in the initial budget. The complex nature of allocating additional money necessitates that the committee is impartial and focused on the year-long picture.

If you decide to submit an appeal for additional funds, there are a couple of items which will be required. You will be required to submit the Student Government’s “Budget Appeals Form”, found on usg.baruchconnect.com under “Important Forms.” (Note: Do not search for this on Google -- it will give you an outdated and expired form, which we cannot accept). Concurrently, we request that you attach an itinerary, being as detailed as possible, explaining what you hope to spend your currently allocated money on, and what you wish to spend any appeals money on.

Appeals go through a stringent process of review inside and outside of the Committee. After the members of the Appeals Committee make their deliberations on the proper allocation, the proposal is then brought to the Senate of the Student Government for approval. If approved at that juncture, it then is brought before the College’s Board of Directors for a final approval, after which the money is transferred into the club’s budget.

The Appeals Chair must adhere to a strict set of deadlines in order to meet the schedule of the Board of Directors, the Senate, and the USG Treasurer. Club leaders will be kept informed of each deadline on a monthly basis, so please be sure to provide and regularly check your club email account for any news. We look forward to a smooth and successful year of appeals!

Benjamin Chatham

Chair of Appeals
Undergraduate Student Government
NVC 3-276
W. (646) 312-312-4736
E. benjamin.chatham@usgbaruch.com
STEP-BY-STEP APPEALS GUIDE

STEP 1
Club wants to appeal for more money

STEP 2
 Obtain Appeals Request Form

STEP 3
Submit proposal to Appeals Committee for review

STEP 4
Meeting scheduled and conducted between Committee and Club

STEP 5
More detail requested by Committee

STEP 6
Committee elects not to present proposal

STEP 7
Appeal presented before USG Senate

STEP 8
Approved as stands
Modified, but approved
Rejected

STEP 9
Sent to Board of Directors for approval

STEP 10
Approved
Rejected
WHAT IS A USG CO-SPONSORSHIP?
Club leaders can request for marketing power and/or additional funding of up to approximately $500 for their events in the form of a co-sponsorship from USG.

WHO DO I CONTACT FOR USG CO-SPONSORSHIP?
The Chair of Clubs and Organizations is responsible for all USG Co-sponsorships requests. You can contact him or her at interclubaffairs@gmail.com

WHAT DO I NEED TO PROVIDE?
You need to submit a co-sponsorship form which can be located at www.baruch.cuny.edu/studentaffairs/StudentLife/clubs/resources.htm. You can submit it to the Chair of Clubs and Organizations in person OR scan the form along with other necessary paperwork and send it via email.

WHAT ARE THE OTHER NECESSARY PAPERWORK?
   a. Payment Request Voucher (up to $250)
   b. Purchase Requisition Voucher, Payment Request Voucher, Bid Form ($250-$500)
   c. Detailed Breakdown of Expenditures on how the money will be used
   d. If event was held previously, breakdown of past expenditures
   e. Flyer of the event

WHEN IS THE DEADLINE TO SUBMIT ALL PAPERWORK?
Forms should be submitted TWO WEEKS prior to the event in order to give the Chair of Clubs and Organizations time to evaluate your co-sponsorship request. If submitted late, co-sponsorship requests will NOT be accepted unless a valid reason is given.

HOW ARE USG CO-SPONSORSHIP EVALUATED?
The Chair of Clubs and Organizations along with her or his committee will review your requested amount, taking your current budget, breakdown of expenditures, and other various resources into consideration.

HOW DO I KNOW USG CO-SPONSORSHIP HAS BEEN APPROVED?
The Chair of Clubs and Organizations will send an official email, informing you that the request has been approved along with the official USG logo to be placed onto the marketing materials.

OTHER QUESTIONS?
You can schedule a meeting with the Chair of Clubs and Organizations via email if you have any additional questions or concerns.
**Finance Committee**

The Finance Committee plays an integral role in club operations at Baruch College by serving as the primary point-of-contact for the funding of active on-campus undergraduate organizations. The ultimate goal of the Committee is to support Baruch’s clubs and organizations with the financial backing they need to nurture their development while catering to the needs of students. The Committee allocates funds from collected Student Activity Fees thereby allowing clubs to hold events that successfully achieve their respective missions, acquire a larger member base, and have a positive impact on the quality of college life for their fellow Bearcats.

The budget allocation process is a complex, multi-step process that requires coordination and communication between the Finance Committee and the members of the student clubs it helps. Members of the Committee will meet with some or all E-Board members of each club to discuss funding for the upcoming academic school year. In addition, the Committee will attend club events held to ensure the proper spending of allocated funds and experience the impact its decisions has on club and student life at Baruch College. By also taking into consideration factors including, but not limited to, an organization’s goals, on-campus history, outreach, and efficiency, the Finance Committee effectively and appropriately allots funding on a per club basis.

Below are a series of steps of how to work with the Finance Committee to obtain a budget for the 2015-2016 academic year:

6. Logon to BaruchConnect.com
7. Select the “Student Government” tab
8. Select “Important Forms”
9. Select “Budget Proposal Form”
10. Complete the form and email it to salma.mohamed@usgbaruch.com
11. Upon receipt, a member of the Finance Committee will attempt to schedule an interview with the club’s E-Board. The following items must be brought to the interview:

   A. Budget proposal
   B. Current budget allocation
   C. Club members are encouraged to show up at these meetings to answer questions and support their statements
7. Utilizing the interview and other factors, the Finance Committee will determine the most appropriate allocation of funds to the club
8. The Senate will vote on the Committee’s proposed budget during a scheduled USG meeting after the budget submission deadline
9. Once the Senate has passed its vote, the budget must be voted upon by the Board of Directors (BoD)