

**2021-22**

**JEFFERSON**

**STUDENT**

**ORGANIZATION**

**MANUAL**

**\*\*\*PLEASE READ\*\*\***

**What is the Student Organization Manual?**

The Student Organization Manual is published each academic year by the Office of Student Life and Engagement to communicate important information, policies, and procedures regarding student organizations here at Jefferson. We encourage all student organization members, and particularly student organization officers and advisors, to familiarize themselves with the content and use the manual as a reference throughout the year.

Additional resources (including information, training, access to forms, and more) are as follows:

- **Student Organization Support Website** ([www.jefferson.edu/sos](http://www.jefferson.edu/sos))
- **Student Organizations Link Canvas Course** ( [www.canvas.jefferson.edu](http://www.canvas.jefferson.edu) ) – log in to access the course on your dashboard. Instructions to self enroll can be found at [www.jefferson.edu/sos](http://www.jefferson.edu/sos) in the Annual Registration Process link

**\*\*\*Please note that due to COVID19 some policies are subject to change as the institution updates its policies and procedures in regards to safety and events. Changes in Policy will be announced on the Student Organization Link Canvas Course. OSLE reserves the right to require student organizations to modify any event, activity, or purchase requests to best support the health and wellness of our campus and community while upholding best practices and safety precautions.\*\*\***

**Who should you contact with questions?**

One of the roles of the Office of Student Life and Engagement is to provide guidance and support to Jefferson's student organizations. We are happy to serve as a resource to our student organization officers and advisors and encourage you to reach out to our office with any questions.

We will do our best to respond to your inquiries **within two to three business days**. Please contact us using the information below.

**OFFICE OF STUDENT LIFE AND ENGAGEMENT**

Jefferson Alumni Hall, Suite 105

Phone: 215-503-0558

Email: [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu)

Fax: 215-503-9386

**How we will communicate with Student Organizations:**

When sending out important notices and communications, the primary means of notification is through the Student Organization Link Canvas Course. The Office of Student Life and Engagement will post any and all important information in the Announcements Section on the Canvas page. On occasion, OSLE will

send the information via Jefferson email to the student organization officers and advisor listed for the current academic year; a copy will also be send to the student organization email account.

On occasion, additional means of communication may be utilized including such things as including information in the weekly Monday Message email communication.

# **SECTION ONE OPERATING AS A STUDENT ORGANIZATION**

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## **Student Rights, Freedoms and Responsibilities**

Individuals in student organizations are responsible for adhering to all Jefferson policies.

The policies and procedures contained in this student organization manual were written in conjunction with the Code of Conduct / Student Rights, Freedoms and Responsibilities. Students are responsible for ensuring they are aware of the content of that document, which can be found in each College's Student Handbook.

## **Student Organization Recognition Policy**

The Student Organization Recognition Policy is designed to ensure that our student organizations are active, fulfilling their purpose, and contributing to Jefferson and the community. All student groups are bound by this recognition policy. Please note that student organizations are not permitted to be affiliated with or engage in activities on behalf of for-profit organizations.

Student groups that are not recognized by the University (e.g. fraternities) may not represent themselves as affiliated with any part of the University, receive funds from the University, nor use University facilities unless they meet the requirements for use of facilities by outside parties.

### **a. Student Organization Minimum Requirements**

#### **Part A. Student Organizations must:**

- Have officers, members, and an advisor that meet the specifications below.
  - A current Jefferson faculty or staff advisor.
  - At least four but no more than six registered officers for the student organization.
    - Officer positions must be filled by current matriculated students of Thomas Jefferson University.
    - If the student organization's membership eligibility is listed as "All Jefferson Students" or "All Members of the Jefferson Community", then the Executive Board should be interdisciplinary (officers should not all be from the same College).
    - Each organization must have a designated President and a designated Treasurer (The other officer titles may be determined by the student organization, but may not be duplicate positions [e.g. each student organization may only have one President at a time.]) These officer titles should match those listed in the organization's bylaws and should remain consistent from year to year.

- Students may not hold more than one officer position within a single student organization and may not hold more than two officer positions across student organizations.
- Organizations are permitted and encouraged to have internal leadership positions within their organizations. Internal leadership positions could be committee leaders, coordinators, directors, etc. These positions can be changed year to year to meet the needs of an organization as they do not need to be listed in the bylaws, registered with OSLE, or complete training.
  - At least six members in addition to the officers.
- Complete the online Student Organization Registration Form that includes a roster of the organization's officers, members, and advisor. Please list contact information for each individual.
- Have all officers successfully complete the online Student Organization Officer Training (this entails viewing the presentations, documents, and other information, and obtaining a 90% or higher on each quiz).
- Have current constitution/bylaws on file in the Office of Student Life and Engagement.

**Part B. Additionally, student organizations must:**

- Adhere to the policies and procedures in the Student Organization Manual.
- Notify the Office of Student Life and Engagement of any changes in Student Organization Leadership within one week of the change (this includes Executive Board Transitions prior to the end of May, loss or addition of a student organization officer, and loss or addition of a student organization advisor)\*\*
- Hold at least two organizational meetings per semester.
- Contribute to campus life or the community through at least one activity, event, or program per semester (fall and spring).
  - **Note:** Fundraising events with the intention to raise monies to benefit the student organization itself do not qualify.
- Submit the Mid-Year Progress Report by December 31<sup>st</sup> and the End of Year Report by May 31<sup>st</sup> (The reports will provide information on the semester activity of the student organization [meetings, events, fundraising, etc.] and how the organizational purpose was supported. Student organizations can access the Reports in the "Assignments" Section of the Student Organization Link Canvas course. Mid and end of year reports will be accepted between December 1<sup>st</sup>-31<sup>st</sup> and May 1<sup>st</sup>-31<sup>st</sup>, respectively).



**NOTES:** When reviewing student organization registrations for the current academic year, a student organization's status will be determined based upon whether they completed the above requirements during the prior academic year.

**b. Student Organization Status**

The following categories will be used to designate student organization status:

1. **Active Organizations** (Existing Organizations Meeting Requirements)
  - Organizations must meet the stated minimum requirements to receive active status for the current academic year.
2. **Developmental Organizations** (New Organizations)
  - Any student who is interested in starting a new student organization must go through the Office of Student Life and Engagement for approval. See the "Starting a New Student Organization" segment in this section of the Student Organization Manual.
  - Proposals for new organizations will be accepted once a semester
  - The fall semester deadline for proposals is November 1<sup>st</sup>. Approved proposals will be granted developmental status for the spring semester of that academic year.
  - The spring semester deadline for proposals is May 1<sup>st</sup>. Approved proposals will be granted developmental status for the upcoming academic year.
  - The summer deadline for proposals is June 15<sup>th</sup>. Approved proposals will be granted developments status for the upcoming academic year.
  - If the developmental organization does not complete the Student Organization Minimum Requirements by the end of the academic year, it will be deemed inactive.
3. **Probationary** (Existing Organizations Not Meeting Requirements or Not Adhering to Policies and Procedures)
  - Probationary status will be given to:
    - Student organizations that complete Part A but do NOT complete Part B of the Student Organization Minimum Requirements.
    - Student organizations originally designated as Active or Developmental from the Annual Registration Process but failed to adhere to the policies and procedures of the Student Organization Manual during the academic year.

- Probationary status may be assigned for the semester or for the academic year.
- Student Organizations with a probationary status will have some restrictions to the standard Student Organization Privileges.
- The President or their officer designee must meet with the Office of Student Life and Engagement at least once in order to develop a plan of action for regaining active status for the next academic year. Depending on the reason for probation, an update report (discussing progress in the implementation of the action plan) may be required to be submitted to the Office of Student Life and Engagement one month after the officer meeting.
- Probationary organizations must complete the Student Organization Minimum Requirements or they will be given a status of inactive for the next academic year.

#### **4. Inactive**

- Student organizations that do not complete Part A of the Student Organization Minimum Requirements will be given a status of inactive for the current academic year.
- Organizations may come off inactive status by completing the Part A requirements by September 1<sup>st</sup>; they will then be given a probationary status for the current academic year.
- Student organizations that were on probationary status for the previous academic year and did not meet the Student Organization Minimum Requirements will be given a status of inactive for the current academic year.
- Student organizations with an inactive status will not be recognized and will lose all privileges.
- If there is interest in reactivating an inactive student organization, students should schedule a meeting with OSLE.

#### **c. Student Organization Privileges**

*(PLEASE SEE THE CHART ON THE NEXT PAGE)*

Student organizations have the following privileges based upon their status:

<b>Student Organization Privilege</b>	<b>Active Status</b>	<b>Developmental Status</b>	<b>Probationary Status</b>	<b>Inactive Status</b>
Apply for Annual Budget Allocations from the Office of Student Life and Engagement	X	X	X*	
Apply for Special Funding	X	X		
Access their Student Organization Operating Account	X	X		
Access their Student Organization Agency Account (if applicable)	X	X		
Engage in fundraising efforts	X	X	X	
Receive donations from a professional association affiliation or other external source	X	X	X	
Use facilities on campus for meetings, events, and activities	X	X	X	
Use student organization email account	X	X	X	
Publicize the student organization on campus and to the Jefferson community	X	X	X	
Participate in the Involvement Fair and other University events	X	X	X	
Be included in the Student Organization Directory	X	X	X	
Be eligible for awards	X	X		

\*Organizations starting the academic year with a Probationary status for the fall semester only, may apply for funds during annual budget allocations but those funds will only be made available during the spring semester provided the organization has been moved from Probationary status to Active status.

## Student Organization Advisors

### **a. Role of the Advisor**

The advisor's role is to support and provide guidance to the student organization. Advisors will counsel and advise student organizations by asking questions, assisting students in their brainstorming and decision making processes, and challenging the organization to go beyond the status quo. Advisors can also provide continuity for a student organization through officer transitions each year; they can pass along valuable information regarding the history of the organization and their past accomplishments. An active advisor can improve the effectiveness of an organization while also assisting in the positive development of the students.

The position of advisor is strictly voluntary, there is no financial compensation.

### **b. Criteria for Selection**

The advisor must be a current Jefferson faculty or staff member. The advisor will be selected by consensus of the student organization officers and/or membership and should be an individual that has an interest in or experience with the stated goals and purpose of the student organization.

### **c. Responsibilities of the Advisor**

- Sign the Advisor Acknowledgement form located in the Student Organization Advisor Link Canvas Course. (See Advisor Acknowledgment Form section below for more details) Advisors will be enrolled in this community once they have been identified on the annual registration form.
- Review the policies and procedures in this Student Organization Manual and advise the student organization accordingly.
- Serve as a resource to the student organization officers and take an active role in supporting the student organization including serving as the administrator on organizations Canvas Courses and approved social media pages.
- Provide guidance to the student organization and ensure that all decisions pertaining to the organization are made by the officers and members in collaboration with the advisor.
- Engage in risk management through:
  - Staying informed about the activities of the student organization, including but not limited to events and purchases.

- Adhering to established policies and procedures, including but not limited to, those listed in this Student Organization Manual and those of Jefferson.
- Being present at student organization events where non-Jefferson participants (excluding guest speakers) and/or alcohol are present.
- Reaching out to the Office of Student Life and Engagement with any questions or concerns.
- Serve as a Campus Security Authority under the Clery Act.

The Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (“the Clery Act”) is a federal statute named for Jeanne Clery, a Lehigh University student who was raped and murdered in her dorm room in 1986. Her parents and supporters believe Ms. Clery would have been more cautious and could have potentially survived if she had known about other violent crimes at Lehigh. The law enacted in her memory is intended to ensure that students, potential students, and other campus community members are informed about campus crime to permit them to make informed decisions.

Many crimes and incidents, including incidents of student sexual assault, are not reported to the police. To ensure that students and other community members are aware of the nature and extent of dangers on their campus, the Clery Act requires universities to gather and publish crime-related data from statutorily defined “Campus Security Authorities.”

**As a Faculty Advisor to a Student Organization, you are a university official with significant responsibility for students and campus activities and will therefore be a Campus Security Authority (CSA) for purposes of the Clery Act.** As a CSA, you are responsible for reporting to the Campus Security Department all good faith criminal allegations of which you become aware. The following outlines in further detail your Clery Act responsibilities.

#### **Campus Security Authority Responsibilities**

- To report to the Campus Security Department immediately any criminal allegations made in good faith.
- Endeavor to maintain confidentiality. If the alleged victim requests confidentiality, you should tell him/her that you must report the incident to Campus Security for statistical purposes, but you will not identify him/her or anyone involved without permission or unless required by law.\*
- You should encourage the person to report the crime to police and you may tell him/her how s/he can report the crime. You should not, however, insist that the incident be reported to the police.
- Information to Report:
  - Type/Details of the Crime

- The facts of the incident – you are not expected to properly categorize the crime.
- Provide as much detail as possible.
- If you are not sure whether an incident is reportable, err on the side of caution and report it to Campus Security.
- Location of the Crime
  - On Campus
  - On Campus, in residence halls
  - On public property adjacent to campus (be very specific of the location of the incident)
  - On non-campus property owned or controlled by the University or a recognized student organization
- Time of Crime
  - When the crime or incident occurred
  - When it was reported to you

\*Note that when crimes involve aspects of sexual harassment or sex-related assault or violence, Title IX may require Jefferson to conduct an investigation that could lead to disclosure (even inadvertent) of the victim's identity.

### **Crimes to Report**

You may report to the Campus Security Department any and all allegations of criminal conduct of which you become aware. However, you **must** report good faith allegations of the following criminal conduct:

- Criminal homicide (including negligent and non-negligent manslaughter)
- Sex offenses – forcible and non-forcible
- Robbery
- Aggravated assault
- Burglary
- Motor vehicle theft

- Arson
- Arrest and disciplinary referrals for violations of liquor, drug, and weapons laws
- Domestic violence, dating violence, and stalking incidents (effective March 2014)
- Hate crimes
  - A hate crime is any crime manifesting evidence that the victim was selected because of the victim's race, religion, gender, national origin, ethnicity, disability, sexual orientation, or gender identity.
  - If any of the crimes listed above include evidence that the crime was a hate crime, the relevant personal characteristic must be included in the report to Campus Security.
  - In addition to the crimes listed above, the following additional hate crimes must be reported:
    - Theft / larceny
    - Simple assault
    - Intimidation
    - Destruction / damage / vandalism of property
    - Any other crime involving bodily injury

**Examples of Crimes that MUST be Reported:**

- A student talks to his advisor in confidence about his roommate who recently stole his bicycle.
- A student talks to her advisor in confidence about an on-campus party she attended at which she was drugged and sexually assaulted.
- A student talks to her advisor in confidence about her dorm being broken into and her laptop being stolen.
- A student tells his advisor that he was robbed while walking to his dormitory while late at night.

**Crime Reporting**

Contact the Investigations unit of the Thomas Jefferson University Campus Security Department at 215-955-8175 or 215-955-6331.

#### **d. Advisor Resources**

The primary resources for Advisors are the Student Organization Manual, the Student Organization Support website ([www.jefferson.edu/sos](http://www.jefferson.edu/sos)), the Student Organization Advisor Link (Canvas) and the Office of Student Life and Engagement. Advisors may reach out to the Office of Student Life and Engagement ([StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu)) throughout the year for additional information and support in their role.

#### **e. Advisor Acknowledgement Form**

As part of the Annual Registration Process, advisors must sign an electronic statement certifying that they have read and understand the Student Organization Manual and their responsibilities as a Campus Security Authority under the Clery Act, they are the Advisor to the student organizations named on the form, that they accept the stated Responsibilities of an Advisor, and that they understand the Advisor Resources available to them. Please see the Annual Registration Process segment in this section of the Manual for additional details on how and when to complete the form.

**Please note that a student organization's status will be put on hold (preventing them from engaging in any student organization business such as events and purchases) until the Advisor Acknowledgement Form is completed.**

### **Starting a New Student Organization**

What should you do if there isn't a student organization at Jefferson that you feel is the right fit for you? You can start your own! Starting a new student organization may seem daunting at first but it is a great way to connect with your fellow students over a shared interest while contributing to the Jefferson community. You and other interested parties will work together to develop the foundation for the new student organization. Throughout the process of starting and implementing a new student organization, you will likely encounter many opportunities for personal and professional growth, while helping to create and foster a new community for like-minded individuals on campus. We've put together some important information, including timelines and specific steps, to help you get started in creating a new student organization.

#### **A. Timelines**

New student organization proposals will be reviewed by the Office of Student Life and Engagement on a rolling basis. The process for proposing a new student organization is as follows:

#### **Fall Semester Timeline (for spring developmental status)**



- Informational Meeting with the Office of Student Life and Engagement - Recommended Deadline: October 1<sup>st</sup>
- Draft Proposal submitted to Office of Student Life and Engagement - **Required Deadline: October 15<sup>th</sup>**
- Final Proposal submitted to the Office of Student Life and Engagement - **Required Deadline: November 15<sup>th</sup>**
- Approved proposals will be granted developmental status for the spring semester of that academic year.

#### **Spring/Summer Semester Timeline (for fall developmental status)**

- Informational Meeting with the Office of Student Life and Engagement - Recommended Deadline: April 1st
- Draft Proposal submitted to Office of Student Life and Engagement - **Required Deadline: May 1<sup>st</sup>**
- Final Proposal submitted to the Office of Student Life and Engagement - **Required Deadline: June 1<sup>st</sup>**
- Approved proposals will be granted developmental status for the spring semester of the current academic year.

Students will be notified via email with next steps once a decision has been made by OSLE. New student organizations approved in the fall semester will be granted developmental status for the spring semester of that academic year. New student organizations approved in the early spring will be granted developmental status for the spring semester of the current academic year. New student organizations approved in the late spring or summer semesters will be granted developmental status for the fall semester of the following academic year.

### **B. Steps to Starting a New Student Organization**

#### **a. Informational Meeting**

Set an Informational Meeting with the Office of Student Life and Engagement. Please come to the meeting prepared to discuss the idea you have for the new student organization. We'll review some important information with you and let you know what you need to do to get started. To schedule the Informational Meeting, please email [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) with the subject "Starting a New Student Organization."

#### **b. Draft Proposal**

Following the Informational Meeting, you'll put together a draft of the following two documents which will comprise your new student organization Proposal.

- **A cover sheet that includes the following information**
  - 1. Student Organization Name**
  - 2. Student Organization Officers** (at the present time) – student organizations must have at least four members serving in the role of officer.

Each organization must have a designated President and a designated Treasurer. The other two officer positions may be determined by the student organization.

You must include the following information for each officer:

- First and last name
- Campus key
- Officer position
- College
- Jefferson Email

### **3. Student Organization Advisor**

The position of advisor is strictly voluntary, there is no financial compensation. The advisor is selected by consensus of the student organization officers and/or membership and must be a current Jefferson faculty or staff member.

We encourage you to select an individual that supports the intended mission of the student organization and who is willing to serve as a resource to the officers and members. You may wish to share the Student Organization Advisors section of this manual with anyone that you are considering for the role. Please ensure that you have received confirmation from the individual that they will serve as Advisor before listing them on your Proposal.

You must include the following information for the Advisor:

- First and last name
- Position at Jefferson (title)
- Department/Office
- Jefferson Email

### **4. Disclosure of Affiliation with External Group**

Student organizations may be affiliated with a “parent” group or external group (as is typical for professional associations) if the student organization discloses that affiliation in this section AND in the bylaws. You must certify that the conditions for affiliation with the “parent” or external group do not conflict with the standards of the University.

Additionally, you will need to provide a copy of the Constitution and/or Bylaws of the “parent” or external group. This should be submitted as an Appendix to the cover letter.

### **5. Goals**

In this section, you will state:

- Why you think there is a need for this new student organization
- What you would like the organization to accomplish – this should include both short term and long term goals

- **Bylaws for the new student organization**

Please see information that follows in the “Writing Organization Bylaws” segment for a template. Additionally, you can refer to the “Sample Organization Bylaws” segment to see an example of completed bylaws.

Once you’ve completed the above, submit the Draft Proposal to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu). Our office will review the information and reach out to you if there’s any additional information, suggested edits, or clarification needed.

**c. Final Proposal**

Once you’ve heard back from the Office of Student Life and Engagement about your Draft Proposal, please make any final edits or updates and then submit the Final Proposal to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu). This is what will be shared with the Office of Student Life and Engagement Committee.

**d. Office of Student Life and Engagement Committee Meeting**

The Committee will review the proposal. Approved proposals will be granted developmental status for the next fall or spring semester of that academic year. The Office of Student Life and Engagement will contact the proposed new student organization with their status and other relevant information after the meeting.

Student organizations receiving developmental status will need to complete the Annual Registration Process as outlined in this Student Organization Manual before they may start operating.

## Writing Organizational Bylaws

Bylaws govern the student organization and provide direction for how the group is organized. The bylaws should explain the student organization's name and purpose, the qualifications of membership and members' duties, rights and responsibilities, the details of meeting, handling of funds, the process for amending bylaws, advisor selection, and other details about the student organization's operational aspects. They should also outline a regular and fair method of selecting leadership for the student organization.

Student organizations may be affiliated with a "parent" group or external group (as is typical for professional associations) if the student organization discloses that affiliation in their bylaws.

**Bylaws are fixed and changed in only very specific circumstances, so no proper names or other types of contact information should be included.**

We have provided a sample Organizational Bylaws below for your use in constructing your own student organization's Bylaws. Please note that all Article and Section Titles included in the sample must be addressed in your Bylaws. Additionally, areas highlighted must be included as is in your Bylaws.

## Sample Organizational Bylaws

### Ob/Gyn Society Bylaws

#### Article I: Name

Section 1. *The name of this organization shall be the Ob/Gyn Society.*

#### Article II: Purpose

Section 1. *The purpose of the Ob/Gyn Society is to:*

- Help Jefferson students gain an understanding of what is involved in a career in Ob/Gyn.
- Inform Jefferson students at all stages of training about the educational, community service, and legislative activities of the American College of Obstetricians and Gynecologists (ACOG).
- Learn concepts related to women's health maintenance and disease prevention.
- Promote clinical skills related to women's health.
- Raise awareness of gender differences in health issues.
- Strengthen interdisciplinary efforts related to women's health projects.

- Increase women's health advocacy within the Jefferson and Philadelphia communities.
- Promote student participation in the development of the Ob/Gyn Society.
- Offer ACOG as resources to Jefferson students interested in Ob/Gyn and careers in women's health care.

**Article III: Field of Membership**

Section 1. *Eligibility Requirements*

- All students of Thomas Jefferson University are eligible for membership.
- Individuals must attend one Ob/Gyn Society meeting or sponsored event per semester to be considered a member for that academic year.

Section 2. *Member Privileges*

Members are allowed to participate in any event that is sponsored by the Ob/Gyn Society.

**Article IV: Officers**

Section 1. *Officer Titles*

- President
- Vice President
- Treasurer
- Events Coordinator - Adopt-A-Mom Coordinator

Section 2. *Qualifications for Each Office*

Each officer must be a current matriculated student at Thomas Jefferson University.

Section 3. *Terms of Office*

The term for each office shall run for an entire year, starting on July 1<sup>st</sup> and ending on June 30<sup>th</sup>.

Section 4. *Duties of Officers\**

- President: The President shall organize and preside over all meetings. The president is also the main contact person between the Ob/Gyn Society and the Ob/Gyn Department of Thomas Jefferson University Hospital.
- Vice President: The Vice President shall preside over meetings in the absence of the President, and will assist the President with the oversight of the student organization. The Vice President will maintain attendance records for all events.
- Treasurer: The Treasurer is responsible for all fiscal matters.
- Events Coordinator: The Events Coordinator is responsible for planning events sponsored by the Ob/Gyn Society.

\*In addition to the listed duties, all officers must work together to ensure the goals of the organization are met.

#### Section 5. *Provisions for Selection/Replacement of Officers*

- Elections for new officers shall take place in April of each year and those elected shall start the new term on July 1st.
- Those who receive a simple majority of votes shall be elected as new officers.
- Power will be transferred to the new leadership after an orientation run by the outgoing officers.

#### Section 6. *Provisions for Removal of Officers*

- If an officer is unable to fulfill his/her duties, he/she may be removed from office by a simple majority vote by the remaining officers.
- If the officer is successfully removed, a special election will be held within two weeks of removal.
- If an officer chooses to step down, no vote needs to occur for their voluntary removal; a special election will be held within two weeks of the officer's exit.

### Article V. **Elections**

#### Section 1. *Voting*

- All members are eligible to vote.
- Proxy votes will be accepted only through official Jefferson email accounts.

## **Article VI. Handling of Funds**

### **Section 1. Financial Transactions**

The Treasurer or any active officer may be the signatory for financial deposits or may make financial requests (funding requests, purchase requests, etc.), following the policies and procedures of the current Student Organization Manual.

### **Section 2. The Role of the Treasurer\***

- Ensuring the student organization adheres to all policies and procedures contained in the Student Organization Manual
- Monitoring the student organization's budget on a regular basis
- Keeping an accurate and up-to-date account of all transactions and corresponding documentation (e.g. receipts, invoices, memos, emails, etc.), including, but not limited to, expenses and revenue
- Providing financial reports to the student organization membership
- Providing a summary report to the Office of Student Life and Engagement upon request
- Assisting the student organization with submitting funding requests, including the Annual Budget Allocation request

\*It is the responsibility of all student organization officers to responsibly manage the finances of that organization, with primary responsibility assigned to the Treasurer of the student organization.

## **Article VII: Amendments**

### **Section 1. Amendment Process**

Bylaws may be amended by the student organization via the following steps:

1. A vote by the officers with at least 60% of the officers in favor of the amendment.
2. If the amendment is approved by the officers, the membership will be notified of the proposed change. Members will have a period 30 days to consider the amendment.
  - a. If no opposition is raised during that 30 day period, then the amendment will go into effect.
  - b. If opposition is present, an official challenge may be made in writing to the Executive Board within the 30 day period. The amendment will then go to the membership for a vote. Bylaws will be amended with a vote by the membership with at least 60% of the members in favor of the amendment.

### **Section 2. Bylaws Update**

An updated version of the student organization's bylaws must be submitted via email to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) within one week of the approved amendment.

## Annual Registration Process

Student organizations must complete the Annual Registration Process for each academic year. As outlined in the aforementioned Student Organization Recognition Policy, a student organization's status will be determined based upon completion of the Student Organization Minimum Requirements.

The Annual Registration Process consists of three components:

- Student Organization Registration Form
- Student Organization Officer Training and Certification
- Advisor Acknowledgement Form

The Deadline for Completion of all three components is as follows:

▪ **Priority Deadline: August 1<sup>st</sup>**

*Student organizations who have successfully completed the Student Organization Registration process in full by July 15<sup>th</sup> will be eligible for priority room assignments.*

*Student organizations who have successfully completed the Student Organization Registration process in full AND have submitted their Annual Budget Allocation Request by July 15<sup>th</sup> will be eligible for priority funding.*

*Please see the Funding segment in Section Two of this manual for additional details on priority funding, and the Room Reservations segment in Section Three of this manual for additional details on priority room assignments.*

▪ **Standard Deadline: August 15<sup>th</sup>**

**NOTE:** For new student organizations granted developmental status for the spring semester, the annual registration process deadline is December 31<sup>st</sup>.

Please see the Quick Reference Guide below to help you through this process. Additional detailed information follows the Guide.



To complete the Annual Registration Process, you will need to do the following:

1. **Complete the Student Organization Registration Form**

Where: Form can be found on the Student Organization Link Canvas Course; enrollment instructions outlined in step 2 below)

Who Should Do This: Any current officer of the student organization for the upcoming academic year (please coordinate amongst the officers to ensure that only one form is submitted).

The form will ask for the following information:

- a. Student Organization Name
- b. Membership Eligibility (e.g. is the organization open to all Jefferson students or only those in one specific College?)
- c. Membership Dues or Fees (Annually)
- d. Directory Information

In advance of filling out the registration form, please review your student organization's directory listing in the Student Organization Directory (which can be accessed by visiting [www.jefferson.edu/sos](http://www.jefferson.edu/sos)), then please list your desired description on this form. Your student organization directory listing will be updated with the information on this registration form. If there is no change to the existing description that is published in the Student Organization Directory, please type in "NO CHANGE". All descriptions are subject to approval from the Office of Student Life and Engagement.

- e. Student Organization Officer information including: first name, last name, campus key, College, anticipated graduation year, phone, Jefferson email, and officer position within the student organization

The maximum number of officers for an organization is six. Any additional leadership positions within an organization should be considered internal and do not need to be registered with the Office of Student Life & Engagement.

**NOTE:** As stated in the Student Organization Minimum Requirements, student organizations must have at least four officers. Officer positions must be filled by current matriculated students of Thomas Jefferson University. If the student organization's membership eligibility is listed as "All Jefferson Students" or "All Members of the Jefferson Community", then the Executive Board should be interdisciplinary (officers should not be all from the same College). Each organization must have a designated

President and a designated Treasurer. The other officer positions may be determined by the student organization, but may not be duplicate positions (e.g. each student organization may only have one President at a time). Students may not hold more than one officer position within a single student organization and may not hold more than two officer positions across student organizations.

f. Annual Executive Board Transitions

- Please list the time of the year that your student organization transitions the Executive Board. *NOTE: This is not necessarily when elections are held, but rather when the new officers officially take over.*

Please enter a month and some additional qualifying information if needed (e.g. Late April).

- Please explain why the annual Executive Board transitions take place at this specific time of year.

g. Advisor information including: first name, last name, campus key, position at Jefferson (title), department/office, campus address, campus phone, and Jefferson email.

h. Student Organization Member information including: first name, last name, campus key, and College.

**NOTE:** As stated in the Student Organization Minimum Requirements, student organizations must have at least 10 members, with at least four of the members serving in the role of officer for the student organization. In this part of the registration form you will provide the information for the other six members. If you have additional members beyond the six you list on this page, we do not require that you provide any information on them.

i. Certification

- i. That the individual listed as the Student Organization Advisor on this form has agreed to serve in the capacity of advisor for the period of September 1, 2021 through August 15, 2022 and is aware of all information being submitted on this form.
- ii. That a current constitution/bylaws are on file in the Office of Student Life and Engagement.

Note: If current constitution/bylaws are not on file, the student organization must email a current copy to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) prior to completing the registration form.

- iii. That you understand that the Annual Registration Process is not complete until ALL of your student organization officers have successfully completed the Student Organization Officer Training in Canvas AND your Advisor completes the Advisor Acknowledgement Form.

## 2. **Complete the Student Organization Officer Training**

Where: Student Organization Link (SOL) Canvas Course (see instructions below)

Who Should Do This: All Officers

In order to ensure delivery of the important information that student organizations need, the Office of Student Life and Engagement has created an online training for officers.

- a. Each student organization officer will need to successfully complete the Student Organization Officer Training annually in Canvas which consists of viewing online training modules and taking corresponding quizzes for each.
  - i. Student organization officers must receive a passing score of 90% or higher for each quiz in order to successfully complete the training. A feedback survey will appear when you have successfully completed all training requirements
- b. To access the training, please follow the instructions below

### Part One (Enroll in the Organization)

1. Click on this link to request to be added to the Student Organization Link course on Canvas <https://jeffline.jefferson.edu/education/programs/soot/>
2. Enter your username (campus key) and password in the appropriate boxes.
3. After entering your login information, you will receive a confirmation message at the top of your screen, stating "Thank you for registering. Enrollments are sent to Canvas on an hourly basis.
4. Your enrollment request will be processed automatically by the system. Please note the following timelines.
  - a. If you already have a Canvas account, you should be enrolled in the Jefferson Students Online University Orientation within a few hours. However, in some instances it may take longer.
  - b. If you do NOT already have a Canvas account, one will be created for you automatically during the daily account creation batch process each morning. In this instance, you may need to wait up to 24 hours before you will be enrolled in the Student Organization Link. In the Organization Search box on the top left of the screen, type "Student Organization Link" and click Go.

Please be patient as your enrollment request is processed. It is an automated process run through institutional systems external to our office. Please only contact our office if you have followed all of the above steps and still not received access after 24 hours.

#### Part Two (View Presentations and Take Quizzes)

1. Once you have been enrolled in the Jefferson Students Online University Orientation course, you will go to Canvas (<https://canvas.jefferson.edu>).
2. Next click on "Campus Key Login" and then enter your Jefferson campus key and password.
3. Once you are logged in, you will see your Canvas "Dashboard" which will display any courses you are enrolled in.
4. Click on the "Student Organization Link (SOL)" course. This will take you to the homepage of the course, from which you should read the information and then begin to progress through each training module. All components of the training must be completed in order to satisfy your Student Organization Officer Training requirement
5. There are four components to the training:
  - a. Student Organization Manual
  - b. Officer Certification
  - c. Presentations
  - d. Quizzes
    - Start by reading the current academic year's Student Organization Manual.
    - Once you are finished reading the manual complete the Officer Certification Statement.
    - After the Officer Certification is complete view the "Operating as a Student Organization" module and complete the corresponding quiz. **Please note that you must review each presentation in order to access its corresponding quiz.** Once you have completed the Operating as a Student Organization Quiz and received a score of 90% or higher continue on to the Event Management presentation, and quiz. **Please note that the Event Management quiz will not be made available to you until you have received a satisfactory score on the Operating as a Student Organization quiz.** After you completed the Event Management quiz and received a score of 90% or higher, continue on to the Financial Management presentation, and quiz. Please note that the Financial Management quiz will not be made available to you until you have received a satisfactory score on the Event Management quiz. Once you have completed the Financial Management quiz and received a score of 90% or higher, you will be taken to a survey asking for feedback. This means you have successfully fulfilled your Student Organization Officer

training requirement. **If you do not are not prompted to fill out a feedback survey this means you have not passed the financial management quiz and you must retake it to fulfill the officer training requirement.**

The Office of Student Life and Engagement will review your scores and record your completion of this requirement.

**Please note that these training will remain available to you throughout the academic year, so anytime you want to reference the information contained in each simply log into Canvas and access the information in the Student Organization Link course.**

3. Complete the Advisor Acknowledgement Form

Where: Student Organizations Advisor Link Canvas course

Who Should Do This: Student Organization Advisor(s)

Advisors must sign an electronic statement certifying that they have received and reviewed the Student Organization Manual and the Clery Act.

Once you have successfully completed all of the above, you will be done with the Annual Registration Process. The Office of Student Life and Engagement will reach out to you to confirm your student organization status for the academic year and provide you with any additional information needed.

<b>Annual Executive Board Transitions / Change in Student Organization Leadership</b>
---

**a. Annual Executive Board Transitions**

Please note that Annual Executive Board Transitions should take place as close as possible to the end of the spring semester to ensure that student organization business continues to run smoothly. Elections may occur earlier; however, it is strongly encouraged that the new officers begin their term after July 1<sup>st</sup>. If there is a gap between when the election takes place and when the newly elected officer's term begins, student organizations can use that time to facilitate training, shadowing, and the sharing of important information to ensure a smooth transition.

For Annual Executive Board Transitions happening between the end of May and July 15<sup>th</sup>, the student organization does not need to notify our office, provided no official student organization business will occur between then and July 15<sup>th</sup> (Annual Registration). Instead, the student organization should just complete the standard Annual Registration Process in July/August. All registration responses will be sent directly to OSLE.

**b. Change in Student Organization Leadership**

If your student organization experiences a change in leadership after the Annual Registration Process in July/August or prior to the end of May, student organizations must complete the Change in Student Organization Leadership Form within one week of the change in leadership. The form may be accessed via the Student Organization Link Canvas course.

A change in leadership includes the following:

- Executive Board Transitions prior to June 1<sup>st</sup>
- Loss or addition of a student organization officer
- Loss or addition of a student organization advisor

After the form has been completed, the Office of Student Life and Engagement will then contact the student organization. For executive board transitions or the addition of a student organization officer, the new officer(s) must successfully complete the Student Organization Officer Training. Student organization business may be placed on hold until this is completed.

For organizations whose annually scheduled transition of leadership happens mid-year (December through February) the following deadlines must be followed in order for your change in leadership to be recognized:

- Elections must take place no later than December 31<sup>st</sup>
- Change in leadership form must be submitted no later than January 15<sup>th</sup>
- All officer training must be complete no later than January 31<sup>st</sup>

Organizations who transition mid-year and do not abide by this timeline will not have their directory pages updated.

# TRANSITION OF LEADERSHIP

## PROCESS

- Leadership should be transitioned per the timeline and procedure outlined in your student organization's bylaws document.
- Leadership Transitions which occur between the end of May and July 15th do NOT need to be reported to OSLE
- Leadership Transitions taking place between September and May require a completed Change in Student Organization Leadership Form within one week of the change in leadership
- Student Organization Officer Training must be completed by each of the new officers in order for the transition to be recognized by OSLE

## TIMELINE

For annual midyear leadership transition (December - January):

- Elections must take place BEFORE December 31st. Elections should be registered with OSLE using the Event Request form.
- Change in Student Organization Leadership Forms must be completed by January 15th
- Incoming officers must complete their Student Organization Officer Training in full by January 31st
- Changes in Leadership will be reflected in the Student Organization Online Directory by March 1st.

*Student Organizations who find themselves with an unexpected need to transition leadership should hold special election within 30 days of the loss of an officer.*

## TIPS

- Make sure to have overlap time between leadership to train incoming officers
- Pass along important documents and contact information
- Provide new officer with a detailed job description
- Provide new officer with institutional account information i.e organizationl email login information
- Double check that all forms for events and purchases taking place around the time of your transition have been submitted and approved.

## **Student Organization Directory**

The information contained in the Student Organization Registration Form will be used to create your Student Organization Directory listing. The Student Organization Directory is entirely online and housed on the Office of Student Life and Engagement's website. The Office of Student Life & Engagement will list the organizational email address and advisor contact information. You may access the directory directly by visiting [www.jefferson.edu/sos](http://www.jefferson.edu/sos).

In the online Student Organization Directory, student organizations each have a pop-up page consisting of standard content. Student organizations may request to customize the webpage (optional) at the start of the academic year by adding a picture and some additional information. To do so, please send your requested content to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) by September 1. Student organizations may only add/change content once per academic year, so please ensure that the information you want to post is suitable to be up on the website for the duration of the academic year.

All text and images are subject to approval by the Office of Student Life and Engagement and must abide by Jefferson's web content guidelines.

## **Student Organization Email Communications**

### **a. Student Organization Email Account**

All recognized student organizations are provided with an institutional email account to use for student organization business. New student organizations are granted an institutional email account upon being recognized.

Student organizations are strongly encouraged to utilize their organization's email account when communicating with both internal and external entities. However, student organizations are not prohibited from using Gmail, Google docs, or Dropbox for internal student organization communications and management.

Student Organization email accounts are the only accepted student organization email accounts when accessing the EMS Web App for room reservations.

### **b. Student Organization Email Access**

Passwords are automatically reset during the Annual Registration Process. After a student organization successfully completes the Annual Registration Process, the Office of Student Life and Engagement will send the student organization officers and advisor an email confirming the student organization status for that academic year, along with the login and password information for the account.



Student organizations with a status of inactive are not permitted to use this student organization email account. Should the student organization's status change to active, developmental, or probationary, use of the student organization email account will be reinstated.

### **Student Organization Announcement and Communications**

Student Organizations can communicate with each other via the Student Organization Link Canvas course. This is a great way to promote your student organization's events and to reach out to other student organizations for potential collaborations.

OSLE has created a thread for Student Organization leaders to communicate with one another within the course.

#### **c. Student Organization Social Media Usage**

Student Organizations are permitted to have a social media accounts on specifically approved platforms. This is a great way to not only promote your student organization's events, recruit new students, but to also share pictures and stories about the work your organization is doing both on and off campus.

Social Media accounts must be created using your student organization's institutional email address (e.g. [sota@jefferson.edu](mailto:sota@jefferson.edu)) and the page name must use the format "[student organization name] at Jefferson". If your student organization name already has Jefferson in it, then you would omit "Jefferson" from your student organization name in order to follow the format noted above. Please refer to the two examples below. The Jefferson logo may not be used as the avatar on the page.

- The correct page name for Student Occupational Therapy Society (SOTA) would be "Student Occupational Therapy Society (SOTA) at Jefferson"
- The correct page name for Jefferson Emergency Medicine Society would be "Emergency Medicine Society at Jefferson"

Additionally, all social media accounts must be registered with the Office of Student Life and Engagement. In order to register your account please out the social media registration form found on the Student Organization Link Canvas course.

At this time, Jefferson allows the use of Facebook, Instagram and Twitter for registered student organizations.

It is also important for student organizations to understand that Thomas Jefferson University's Social Media Policy and Community Standards are applied to any and all activity that takes place on your organization's Facebook page as well as any unsanctioned social media platforms. The current community standards can be accessed at [www.jefferson.edu/handbook](http://www.jefferson.edu/handbook) under the university policies section.

**d. Release for Use of Images and Statements**

Student organizations that take photography, video, or other recordings at their events (e.g. meetings, programs, community service, etc.) for the purposes of sharing publicly or using the images or statements for any student organization business, including posting on social media sites, must have individuals complete a Release for Use of Images and Statements form.

Student organizations can access the Release for Use of Images and Statements forms in the “Forms” Section of the Student Organization Link Canvas course. There are two forms – one is for students and one is for non-students – please be sure to complete the appropriate form. Completed forms must be submitted to the Office of Student Life and Engagement.

# **SECTION TWO FINANCIALS**

## Section Two – Financials CONTENTS

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## PART A - FINANCIAL MANAGEMENT

It is the responsibility of all student organization officers to responsibly manage the finances of that organization, with primary responsibility assigned to the Treasurer of the student organization.

The Treasurer's financial management responsibilities include:

- Ensuring the student organization adheres to all policies and procedures contained in the Student Organization Manual
- Monitoring the student organization's budget on a regular basis
- Keeping an accurate and up-to-date account of all transactions and corresponding documentation (e.g. receipts, invoices, memos, emails, etc.), this includes both expenses and revenue
- Providing financial reports to the student organization membership
- Providing a summary report to the Office of Student Life and Engagement upon request
- Assisting the student organization with submitting funding requests, including the Annual Budget Allocation request

Please note that all forms contained or referenced in the Student Organization Manual can be accessed in the Student Organization Link in Blackboard Learn (in the Forms section).

## PART B - FUNDING

### Student Organization Accounts

Student organizations may NOT hold bank accounts outside of the University. Any student organization found to have such an account will be put on Probationary status and will lose access to their funding until a bank closing statement and the corresponding funds are submitted to the Office of Student Life and Engagement.

Student organizations may have one or both of the following accounts. Accounts are established through and maintained by the Office of Student Life and Engagement.

- **Student Organization Operating Account**
  - Any student organization that applies for and receives an Annual Budget Allocation or Special Funding will have a Student Organization Operating Account.
  - Any funds remaining in a Student Organization Operating Account by May 15<sup>th</sup> will automatically revert back to the Office of Student Life and Engagement.

- **Student Organization Agency Account**

- Agency accounts allow student organizations to make deposits and accrue funds over a period of time, which lets the group set and accomplish long term goals. Funds in this account rollover from one academic year to the next.
- Student organizations must have Active or Developmental status for the current academic year in order to use the funds in this account. Student organizations on Probationary or Inactive status will not be able to access their funds until their status is changed to Active.
- Agency accounts are automatically created for each organization upon approval. If you are unaware of the status of your organization's agency account please send an inquiry to [studentlife@jefferson.edu](mailto:studentlife@jefferson.edu) for more information.

<b>Funding Sources</b>
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For your reference, a summary of each available funding source can be found on the next page. For detailed information, please see the corresponding segments that follow the chart.

*(PLEASE SEE THE CHART ON THE NEXT PAGE)*

<b>FUNDING SOURCE</b>	<b>DESCRIPTION</b>	<b>ELIGIBILITY</b>
<b>Annual Budget Allocations</b>	Annual Budget Allocations are those funds awarded to a student organization based upon the organization's budget request submitted in August.	Active, Developmental, and Probationary (fall only) student organizations
<b>Special Funding</b>	Special Funding is available on a limited basis for student organizations to address their need for funding from not having requested Annual Budget Allocation for programs and expenses that were unforeseen at the time of Annual Budget Allocation requests.	Active and Developmental organizations
<b>Agency Account Funds</b>	Agency accounts hold any funds deposited into the account from a prior or current academic year. These monies may be accessed to fund expenditures in excess of the Annual Budget Allocations or for purchases not permitted with monies in the Student Organization Operating Account.	Active and Developmental student organizations
<b>Fundraising</b>	Student organizations may engage in fundraising efforts to supplement the money allocated to them. Funds raised must be deposited into a student organization's agency account. These monies may be accessed to fund expenditures in excess of the Annual Budget Allocations or for purchases not permitted with monies in the Student Organization Operating Account.	Developmental, and Probationary student organizations
<b>Donations</b>	Student organizations may sometimes receive funding from a professional association that they are affiliated with or a donation from another external source.	Developmental, and Probationary student organizations
<b>Sidney Kimmel Medical College Student Council</b>	Some student organizations may also be eligible for funding from the Sidney Kimmel Medical College Student Council. For more information, please contact the SKMC Student Council Treasurer at <a href="mailto:scsecretary@jefferson.edu">scsecretary@jefferson.edu</a> .	Contact the SKMC Student Council Treasurer for eligibility information.



## **ANNUAL BUDGET ALLOCATIONS**

### **What is an Annual Budget Allocation?**

Annual Budget Allocation funds come from student activities fees and are essentially an annual operating budget for a student organization. Each summer, student organizations must complete the Student Organization Annual Registration Process and Annual Budget Allocation Process. When requesting an Annual Budget Allocation, student organizations will estimate their planned expenses for the period of September 1<sup>st</sup> – May 15<sup>th</sup> of that academic year.

### **What is the deadline for submitting an Annual Budget Allocation request?**

The priority funding deadline for successful completion of the Student Organization Registration and Annual Budget Allocation process is **August 1st**. Student organizations who have successfully completed the Student Organization Registration process in full AND have submitted their Annual Budget Allocation Request by August 1<sup>st</sup> will be eligible for priority funding which means that: the requests will be reviewed first, the requests will be considered in relation to the full amount of funding available, and the student organization will receive their funding decisions earlier. Student organizations are strongly encouraged to meet the priority deadline.

Student organizations who do not meet the priority deadline will have until **August 15th** to successfully complete the Student Organization Registration process in full AND submit their Annual Budget Allocation Request. However, these funding requests will be subject to the availability of any remaining funds and may receive less money than those organizations who met the priority deadline.

### **What is the process for submitting an Annual Budget Allocation request?**

Student organizations will complete the Annual Budget Allocation Request Form and submit it electronically. Please follow the steps below when preparing your Annual Budget Allocation request.

1. Student organizations should **review the Prohibited Uses of Student Organization Funds** found in this manual.
2. When putting together your Annual Budget Allocation request, student organizations should consider the following questions:
  - What do we want to do?
  - How does that relate to our student organization mission, goals, or values?
  - What do we need to achieve that?
  - How much will that cost?

**Student organizations are advised to prepare an outline of all anticipated activities and to obtain expense estimates from vendors.**

### 3. When completing the Annual Budget Allocation Request Form

- The Annual Budget Allocation Request Form must be COMPLETED AND SUBMITTED ELECTRONICALLY via the Annual Budget Allocation Request assignment on the Student Organization Link Canvas course.
- Start by completing an Event / Activity Detailed Expense Sheet for EACH event or activity for which your student organization will be requesting funding.
  - I. All activities that the student organization plans to engage in for the current academic year for which funding is needed must be reflected on an Expense Sheet - including programming, meetings, service, recruitment activities, general organization supplies, etc.
  - II. Include detailed information for each expense and note usage of vendor quotes. Student organizations are encouraged to provide as much information as possible. The more information available, the more an informed decision can be made by the Office of Student Life and Engagement about the level of funding to award.
- Next, complete the Summary Sheet using the information from each Event / Activity Detailed Expense Sheet.
  - i. For each Event / Activity Detailed Expense Sheet that you completed, place the Event / Activity Name and the Total Amount Requested into the corresponding boxes on the Summary Sheet.
  - ii. **Place programs and expenses in order of importance, with the request you deem most important at the top, followed by those of decreasing importance.**

### How are Annual Budget Allocation decisions made?

Annual Budget Allocation requests will be reviewed by the Office of Student Life and Engagement.

**Please note that requests for funding are NOT guaranteed and will be affected by the amount of funding requests received in relation to the overall amount of available funding.**

The following will be considered when making funding decisions.

- Priority Funding Deadline (August 1st)
- Student organization affiliation
  - Priority 1: “One Jefferson” – student organizations: 1) whose membership eligibility is listed as “All Jefferson Students” or “All Members of the Jefferson Community”, AND 2) who have an interdisciplinary Executive Board where no more than two students are

from the same College, AND 3) the purpose of the organization is social, identity based (e.g. gender, religion, culture) or community service based.

- Priority 2: - student organizations: 1) whose membership eligibility is listed as “All Jefferson Students” or “All Members of the Jefferson Community”, AND 2) the purpose of the organization is social, identity based (e.g. gender, religion, culture) or community service based.
- Priority 3: student organizations: 1) whose membership eligibility is specific to a College, OR 2) whose purpose is academic interest / professional association based.
- Funding requests support the articulated mission, goals, and values of the student organization.
- Funding requests do not conflict with the Prohibited Uses of Student Organization Funds.
- Funding requests for events or initiatives that support the stated values of Thomas Jefferson University.
- Funding requests for the following will be given greater priority:
  - Events that are identity based, community service oriented, or involve the humanities
  - Requests for things other than food at events
- Expense detail provided on request form, including how the funding will be used and incorporation of vendor quotes.
- Level of activity by the student organization and impact of events in the prior year(s).
- Usage of Annual Budget Allocations and other funding sources in the prior year(s).\*
- Overlap or duplication of another student organization’s program or service.

\*Unused funds from the 2020-21 academic year, due to activity restrictions placed on organizations in the wake of COVID, will not be considered a factor in the funding award an organization will receive in the 2021-2022 academic year.

Additionally, in the past, funding maximums were set due to the significantly high number of funding requests received. The Office of Student Life and Engagement may use the following funding maximums as needed and may implement additional ones at their discretion when deciding Annual Budget Allocations.

- Food for Lectures or Seminars – funded at \$100 for maximum of two of these types of events
- Food for Panels – funded at \$150 for a maximum of two of these types of events
- Food for Academic Related Special Events (e.g. networking, mentor matching, competitions, etc.) – funded at \$200 for a maximum of two of these types of events

### **What is the deadline for using Annual Budget Allocations?**

Funds from Annual Budget Allocations will be available in a Student Organization Operating Account from September 1<sup>st</sup> – May 15<sup>th</sup> each academic year. Any funds remaining in a Student Organization Operating Account by May 15<sup>th</sup> will automatically revert back to the Office of Student Life and Engagement.

## **SPECIAL FUNDING**

### **What is Special Funding?**

Special Funding comes from student activities fees and is available on a limited basis for student organizations to address their need for funding events from either not having an Annual Budget Allocation or for events that were not covered in their Annual Budget Allocation. Special Funding is not available for summer programming.

### **What is the deadline for submitting a Special Funding request?**

Special Funding requests for the fall and spring semesters of the current academic year will be accepted from October 1<sup>st</sup> – March 30<sup>th</sup>.

### **What is the process for submitting a Special Funding request?**

In order to apply for Special Funding, student organizations must complete both the Event Request Form AND the Special Funding Request Form and submit those forms electronically 30 days in advance of the desired event/purchase date. Please follow the steps below when preparing your Special Funding request (for information on completing an Event Request Form, please see that corresponding section in this manual).

1. Student organizations should review the following document:
  - Prohibited Uses of Student Organization Funds
2. When putting together your Special Funding request, student organizations should consider the following questions:
  - What do we want to do?
  - How does that relate to our student organization mission, goals, or values?
  - What do we need to achieve that?

- How much will that cost?
3. When completing the Special Funding Request Form:
- Special Funding Requests must be COMPLETED AND SUBMITTED ELECTRONICALLY via the Special Funding Request assignment on the Student Organization Link Canvas course
  - A completed Event Request Form must be submitted with the Special Funding Request Form.
  - Include detailed information for each expense and note usage of vendor quotes.
  - Place expenses in order of importance, with the expense you deem most important at the top, followed by those of decreasing importance.
  - Address why the expense was not accounted for or cannot be covered by your student organization's Annual Budget Allocation and/or Agency Account.

### **How are Special Funding decisions made?**

Special Funding requests will be reviewed by the Office of Student Life and Engagement. The following will be considered when making funding decisions:

- Student organization affiliation
  - Priority 1: "One Jefferson" – student organizations: 1) whose membership eligibility is listed as "All Jefferson Students" or "All Members of the Jefferson Community", AND 2) who have an interdisciplinary Executive Board where no more than two students are from the same College, AND 3) the purpose of the organization is social, identity based (e.g. gender, religion, culture) or community service based.
  - Priority 2: - student organizations: 1) whose membership eligibility is listed as "All Jefferson Students" or "All Members of the Jefferson Community", AND 2) the purpose of the organization is social, identity based (e.g. gender, religion, culture) or community service based.
  - Priority 3: student organizations: 1) whose membership eligibility is specific to a College, OR 2) whose purpose is academic interest / professional association based.
- Funding requests support the articulated mission, goals, and values of the student organization
- Funding requests do not conflict with the Prohibited Uses of Student Organization Funds

- Funding requests for events or initiatives that support the stated values of Thomas Jefferson University
- Funding requests for the following will be given greater priority:
  - Events that are identity based, community service oriented, or involve the humanities
  - Requests for things other than food at events
- Expense detail provided on request form, including how the funding will be used and incorporation of vendor quotes
- Level of activity by the student organization and impact of events in the prior year(s)
- Usage of Annual Budget Allocations and other funding sources in the prior year(s) and current academic year
- Overlap or duplication of another student organization's program or service
- Explanation of why the expense was not accounted for or cannot be covered by the student organization's Annual Budget Allocation and/or Agency Account

Additionally, funding maximums have been implemented due to the significantly high number of funding requests received each year. The Office of Student Life and Engagement may use the following funding maximums as needed and may implement additional ones at their discretion when making decisions on Special Funding.

- Food for Lectures or Seminars – funded at \$100 for maximum of two of these type of events
- Food for Panels – funded at \$150 for a maximum of two of these type of events
- Food for Academic Related Special Events (e.g. networking, mentor matching, competitions, etc.) – funded at \$200 for a maximum of two of these type of events

### **What is the deadline for using Special Funding?**

Special Funding monies will be available in a Student Organization Operating Account from the time they are awarded through March 30<sup>th</sup> each academic year. Any funds remaining in a Student Organization Operating Account after the event for which the funds were awarded has passed will automatically revert to the Office of Student Life and Engagement.

### **AGENCY ACCOUNT FUNDS**

### **What are Agency Account Funds?**

Agency Account Funds are those monies that have been deposited into a Student Organization Agency Account, and are separate from any monies in the Student Organization Operating Account. Monies in this account are typically accrued through fundraising efforts or direct donations and rollover each academic year. These monies may be accessed to fund expenditures in excess of the Annual Budget Allocations or for purchases not permitted with monies in the Student Organization Operating Account.

### **When can a student organization use Agency Account Funds?**

Agency Account Funds may be used from September 1<sup>st</sup> – July 15<sup>th</sup> provided the student organization has “Active” or “Developmental” status for that academic year. Monies may be used for purchases not in conflict with the Prohibited Uses of Student Organization Funds.

## **FUNDRAISING**

### **Why should a student organization consider fundraising?**

Student organizations may engage in fundraising efforts to supplement the money allocated to them and/or to raise money for charitable causes. Funds raised must be deposited into the Student Organization Agency Account.\* These monies may be accessed to fund expenditures in excess of the Annual Budget Allocations, for purchases not permitted with monies in the Student Organization Operating Account, and for direct donations to religious and charitable organizations.

### **Are there suggested or recommended fundraising activities?**

Yes, the Office of Student Life and Engagement has worked to identify some standard fundraising opportunities for student organizations, which are listed below:

- Create a fundraiser using the OSLE Paypal account for the collection of funds.

OSLE has a business Paypal account that can be found by searching for our email [studentlife@jefferson.edu](mailto:studentlife@jefferson.edu) on the Paypal app or website. All payments should include the name of the student organization receiving the funds in the notes section of the payment. Payments without a note will be returned.

Once the fundraiser is over OSLE will transfer the funds collected into the agency account of the student organization.

For additional questions or support setting up your page, contact the OSLE at [studentlife@jefferson.edu](mailto:studentlife@jefferson.edu) or 215.503.0558.

- Create a Fundraising Page via Jefferson's Community Fundraising Page (this tool CANNOT be used to fundraise for an outside organization. The funds raised via this site MUST stay within the Jefferson community.)

OSLE has a specific page on the Office of Institutional Advancement's fundraising site for Student Organizations to create a fundraiser. Go to [www.Jefferson.edu/communityfundraising](http://www.Jefferson.edu/communityfundraising) to locate that page.

Select the OSLE Fundraising Page and from that page choose to "Become a Fundraiser" using your student organization's name and email address to create an account. Once the account is created, you can build your specific fundraising page.

For additional questions or support setting up your page, contact the Office of Institutional Advancement at [communityfundraising@jefferson.edu](mailto:communityfundraising@jefferson.edu) or 215.955.0977.

- Percentage sales from a local establishment

This type of fundraising effort involves having a local establishment (typically a restaurant) agree to give your student organization a percentage of sales during a specific period of time. This great fundraising option requires only a small amount of time and effort on the part of the student organization.

Some suggested local establishments include:

- Barra Rossa
- Chipotle
- Honeygrow
- Shake Shack
- SNAP Pizza Kitchen
- Wawa (Hoagie Coupons)
- Bake Sales
- Charging admission or asking for donations at on-campus events run by your student organization (these funds can be collected in person or via the Paypal account mentioned above)
- Selling of promotional items or other merchandise on campus including but not limited to t-shirts, water bottles, etc (these funds can be collected in person or via the Paypal account mentioned above).



Please reference the Marketing and Promotions segment in the Event Management Section of this Student Organization Manual for additional guidelines regarding promotional items and merchandise with the Jefferson name and/or logo.

### **What are the fundraising guidelines?**

- Fundraising efforts are subject to all policies and procedures contained in this Student Organization Manual.
- Fundraising efforts are classified as “events” and as such, student organizations are encouraged to **reference “Section Three - Event Management” of this Student Organization Manual** for information and instructions on how to proceed.
  - Note: In order to engage in fundraising efforts a student organization must first complete and submit the Event Request Form to the Office of Student Life and Engagement at least 14 days prior to the event/fundraising date AND receive a status of “approved” for the event.
- Student organizations may NOT:
  - Collect funds for the sale of alcohol
  - Use personal PayPal, Venmo, crowdfunding sites, or similar online donation sites to collect funds
    - Please contact the Office of Student Life and Engagement to discuss any alternative options that may exist and be permissible.
  - Solicit personal donations outside of any established fundraisers approved by the Office of Student Life and Engagement
- Fundraising monies must be submitted to the Office of Student Life and Engagement within two business days of the event. Please reference the Deposits segment in the Financials section of this Student Organization Manual for details and instructions.

### **When can a student organization use fundraising monies?**

Once the monies have been submitted to the Office of Student Life and Engagement, they will be available for use. Agency Account Funds may be used from September 1<sup>st</sup> – July 15<sup>th</sup> provided the student organization has “Active” or “Developmental” status for that academic year. Monies may be used for purchases not in conflict with the Prohibited Uses of Student Organization Funds.

## **DONATIONS**

### **What are student organization donations?**

Student organizations may sometimes receive funding from a professional association that they are affiliated with or a donation from another external source.

### **What are the donation guidelines?**

Any funds received from these sources must be in the form of a check made payable to either Thomas Jefferson University or the student organization. Funds will be deposited into the Student Organization Agency Account.\*

Donations must be submitted to the Office of Student Life and Engagement within two business days of being received. Please reference the Deposits segment in the Financials section of this Student Organization Manual for details and instructions.

Please note that student organizations are discouraged from soliciting Jefferson funded donations. However, should they choose to pursue this funding option, they must start by setting up a meeting with the Office of Student Life and Engagement. Following that meeting, the student organization should work with their advisor to draft a formal proposal. The proposal should be detailed and professional and should address at a minimum: why the student organization is seeking the funds, the amount they are seeking, and what the funds will be used for. The proposal should then be sent to the Office of Student Life and Engagement for review prior to being sent to the prospective donor.

The student organization may only approach one individual per budget line (such as a senior administrator, department chair, etc.), and must respect the decision made by that individual (i.e. the student organization may not reach back out with additional requests should a donation not be made by that area).

<b>Funding Timeline</b>
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- No funds will be available during the month of August while Student Organization Registration / Annual Budget Allocations are taking place for the new academic year.
- Funds from Annual Budget Allocations will be available from September 1<sup>st</sup>\* – May 15<sup>th</sup> of each academic year.
- Requests for Special Funding will be accepted from October 1<sup>st</sup> – April 30<sup>th</sup> and will be available for use through May 15<sup>th</sup> each academic year.
- Any funds remaining in a Student Organization Operating Account by May 15<sup>th</sup> will automatically revert back to the Office of Student Life and Engagement.

- Student organizations wishing to make purchases from May 15<sup>th</sup> – July 15<sup>th</sup> will need to use available funds from their Agency Accounts.

*\*Availability of funds from Annual Budget Allocations may be delayed depending on when a student organization submits their request. Those student organizations who met the priority funding deadline will have their funds available September 1<sup>st</sup>.*

Student Organization Funding Timeline Chart				
AUGUST	No funds will be available - Student Organization Annual Registration Process . Annual Budget Allocation Requests are submitted and reviewed at this time.			
SEPTEMBER	Agency Funds Available	Funds from Annual Budget Allocations Available	Fall/Spring Special Funding Requests Accepted	Fall/Spring Special Funding monies may be used
OCTOBER				
NOVEMBER				
DECEMBER				
JANUARY				
FEBRUARY				
MARCH				
APRIL				
MAY				
JUNE				
JULY				

#### Prohibited Uses of Student Organization Funds

**Student organization funds (including both Operating Accounts and Agency Accounts) may NOT be used for the following:**

- Appropriation to any partisan, legislative body, political activity, or for the support of the political campaign of any candidate for public office
- For any event or organization that discriminates on the basis of race, ethnicity, religion, gender, sexual preference, age, ability, or national origin
- Legal services, including fines and bail bond funds
- Grants, scholarships, salaries, wages, loans or other personal compensation to any member of the student organization or the advisor

*Note: This does not preclude reimbursement for approved purchases.*

- Alcohol and Tobacco

*Note: Minimal amounts of alcohol may be permissible if it is an integral part of an established cultural or religious practice (e.g. serving wine at Shabbat Dinner).*

- External advertisements (e.g. Philadelphia Inquirer)
- Express or otherwise expedited shipping
- Personal services or personal items including anything purchased specifically for individual members of the student organization
- Events not originating with the student organization (e.g. a University or Hospital department should not reach out to a student organization asking them to fund an event originating from that department; the department's own budget should be used)
- Other expenses deemed inappropriate by the Office of Student Life and Engagement, the Office of Risk Management, or Thomas Jefferson University

**Student Organization Operating Account funds may NOT be used for the following, however, Agency Account funds may be used if available:**

- Food for general body meetings of the student organization

*Note: If there will be a guest speaker or other activity taking place during the meeting, you may be able to use annual budget funds. Please check with the Office of Student Life and Engagement.*

- Post-Match Panels
- Gifts or Prizes (e.g. a mug or gift card for a presenter or participant)
- Direct donations to religious or charitable organizations
- Conferences – including registrations, fees, and travel
- Student organization attire (e.g. t-shirts)
- Promotional items for the student organization

***Please see the chart below for quick reference of prohibited uses of student organization funds.***

PROHIBITED USES OF STUDENT ORGANIZATION FUNDS	OPERATING ACCOUNT	AGENCY ACCOUNT
<ul style="list-style-type: none"> <li>Appropriation to any partisan, legislative body, political activity, or for the support of the political campaign of any candidate for public office</li> </ul>	X	X
<ul style="list-style-type: none"> <li>For any event or organization that discriminates on the basis of race, ethnicity, religion, gender, sexual preference, age, ability, or national origin</li> </ul>	X	X
<ul style="list-style-type: none"> <li>Legal services, including fines and bail bond funds</li> </ul>	X	X
<ul style="list-style-type: none"> <li>Grants, scholarships, salaries, wages, loans or other personal compensation to any member of the student organization or the advisor</li> </ul> <p><i>Note: This does not preclude reimbursement for approved purchases.</i></p>	X	X
<ul style="list-style-type: none"> <li>Alcohol and Tobacco</li> </ul> <p><i>Note: Minimal amounts of alcohol may be permissible if it is an integral part of an established cultural or religious practice (e.g. serving wine at Shabbat Dinner).</i></p>	X	X
<ul style="list-style-type: none"> <li>External advertisements (e.g. Philadelphia Inquirer)</li> </ul>	X	X
<ul style="list-style-type: none"> <li>Express or otherwise expedited shipping</li> </ul>	X	X
<ul style="list-style-type: none"> <li>Personal services or personal items including anything purchased specifically for individual members of the student organization</li> </ul>	X	X
<ul style="list-style-type: none"> <li>Events not originating with the student organization (e.g. a University or Hospital department should not reach out to a student organization asking them to fund an event originating from that department; the department's own budget should be used)</li> </ul>	X	X
<ul style="list-style-type: none"> <li>Food for general body meetings of the student organization</li> </ul> <p><i>Note: If there will be a guest speaker or other activity taking place during the meeting, you may be able to use Operation Account funds. Please check with the Office of Student Life and Engagement.</i></p>	X	
<ul style="list-style-type: none"> <li>Post- Match Panel</li> </ul>	X	

• Gifts or Prizes (e.g. a mug or gift card for a presenter or participant)	<b>X</b>	
• Direct donations to religious or charitable organizations	<b>X</b>	
• Conferences – including registrations, fees, and travel	<b>X</b>	
• Student organization attire (e.g. t-shirts)	<b>X</b>	
• Promotional items for the student organization	<b>X</b>	
• Other expenses deemed inappropriate by the Office of Student Life and Engagement, the Office of Risk Management, or Thomas Jefferson University	<b>X</b>	<b>X</b>

#### **Funding Maximums**

The Office of Student Life and Engagement has developed guidelines for the maximum amount that should be spent for certain standard student organization purchases. Please take note of the below maximums and use them as appropriate when requesting funding or submitting the Request to Purchase Form (see Part 2 – Purchasing). Your funding or purchasing requests may include amounts less than but not in excess of these funding maximums.

- Food (Lunch Programs) - \$10/person
- Food (Dinner Programs, Special Events) - \$20/person
- Promotional Items (t-shirts, other imprinted merchandise) - \$10/item

## **PART C – PURCHASING**

# PURCHASING GUIDE

Student Organization  
Management

2020-2021

Office of Student Life  
& Engagement

Please reference the 2020-2021 Student Organization Manual for a detailed guide on completing purchases.

## 1. Preparation

- **Are the funds coming from your Annual Budget, Agency Account, or an alternative funding stream?**
- Annual Budget: check to make sure the purchase items were approved in the annual budget allocation
- Agency Account: check that there are enough funds available
- If alternative funding streams are partially covering the purchase, collect contact information from the department/organization
- If alternative funding streams are covering 100% of the purchase, complete the payment through that department (not OSLE)
- Research costs, shipping/delivery if applicable, gather contact information on vendors, decide on a contact person for pick up/delivery, and save hyperlinks for online orders
- If a payment needs to be sent to an individual/company for services provided, collect contact information and preferred method of payment

## 2. Purchase Request Form

<https://www.surveymonkey.com/r/RequestToPurchase>

- Complete and submit a Request to Purchase form through Survey Monkey
- Form located through the Student Organization Link in Canvas
- Include costs of items needed, quantities, accounts/source of funding being used, vendor contact information, links to online orders
- **Must be submitted at least 14 days in advance of the needed purchase date**
- Please allow 5 business days for processing
- Your patience is appreciated during times of high program activity for OSLE (expect minor delays in response time)

## 3. Status of Purchase

- **The person who submitted the purchase request form will receive the status email of the purchase request: approved, denied, or more info needed**
- The status email will provide instructions on how to proceed with the order/payment
- Depending on the type of purchase, the instructions will vary - please read the email carefully
- For credit card purchases, an OSLE staff member will complete the payment; Students do not personally make payments
- Email confirmations are sent as soon as payments have been completed

## 4. Pick Up/Delivery

- Items ordered online can be delivered to OSLE or to another specified location
- Food orders may be picked up at the vendor or delivered to a location
- Food delivery orders receive a standard 10% tip; please take this into account when budgeting the purchase cost
- Do not add an additional tip upon receipt of the order
- Items delivered to OSLE are stored in the student organization cabinet outside of the office
- Email notifications will be sent when orders arrive

## Things to remember ...

- Majority of purchases are required to have a corresponding event request; exceptions include charitable donations and purchase of personal items for student organization members (both only permitted through agency accounts)
- If you have registered an ongoing event that requires ongoing purchases, please reference the event name on the original event request form
- Thomas Jefferson University is TAX EXEMPT; OSLE can provide a tax exempt form for vendors
- OSLE does not approve reimbursements for students; do not make a purchase in advance without approval and request to be reimbursed
- Check requests may take up to 4 weeks for processing with accounting; please keep this in mind if your purchase requires a payment by check

## Request to Purchase

All activities for which the student organization is using monies from one of their funding sources must originate with the student organization (not a University or Hospital department or outside entity) and must abide by the policies and procedures in this Student Organization Manual. All purchases must be approved in advance by the Office of Student Life and Engagement. Student organizations must complete a Request to Purchase Form for each proposed expense/set of expenses.

### The Request to Purchase Form

- Submitting a Request to Purchase Form is always the first step in the purchasing process. Purchases may **not** be made without an approved Request to Purchase on file.
- The form requires the following information:
  - Corresponding event name/date/location
  - Vendor name and phone number/website
  - Itemized list of purchases or links to exact items if using online vendor
  - Location of delivery (if products, this will be the OSLE office; if food, this will be the approved room location)
  - Contact information for the person receiving/picking up the order. If items are being ordered from an online vendor, then delivery will be made to OSLE in JAH 105. Our office will notify the student organization via email that the items have arrived. The student organization must pick up the items within one week of the delivery notification or the items may be forfeited.
- The Request to Purchase Form must be COMPLETED AND SUBMITTED ELECTRONICALLY via Survey Monkey at <https://www.surveymonkey.com/r/RequestToPurchase> No hardcopy submissions will be accepted.
- Must be submitted **at least 14 days prior to desired purchase date** or at least 30 days prior if a contract\* is involved. If you are requesting an online or custom order, please take into account the added time needed for delivery.
- Must be partnered with an Event Request Form if requested purchases pertain to a student organization event. A completed Event Request Form must already be on file in the Office of Student Life and Engagement (with the status of “Approved”) or must be submitted with this form. **Please view “Section Three – Event Management” of this Student Organization Manual for detailed information on events and the Event Request Form.**



OSLE will review the completed Request to Purchase Form and assign a status of approved, pending, or denied. Pending status indicates that additional information is needed. OSLE will inform the student organization of the status of the request via Jefferson email.

**Student organizations may only proceed with purchases that have been given a status of approved by OSLE. Student organizations that do not both complete the Request to Purchase Form AND receive OSLE approval for the purchase will not be reimbursed and may be placed on probationary status.**

*\*See "Contracts" segment below.*

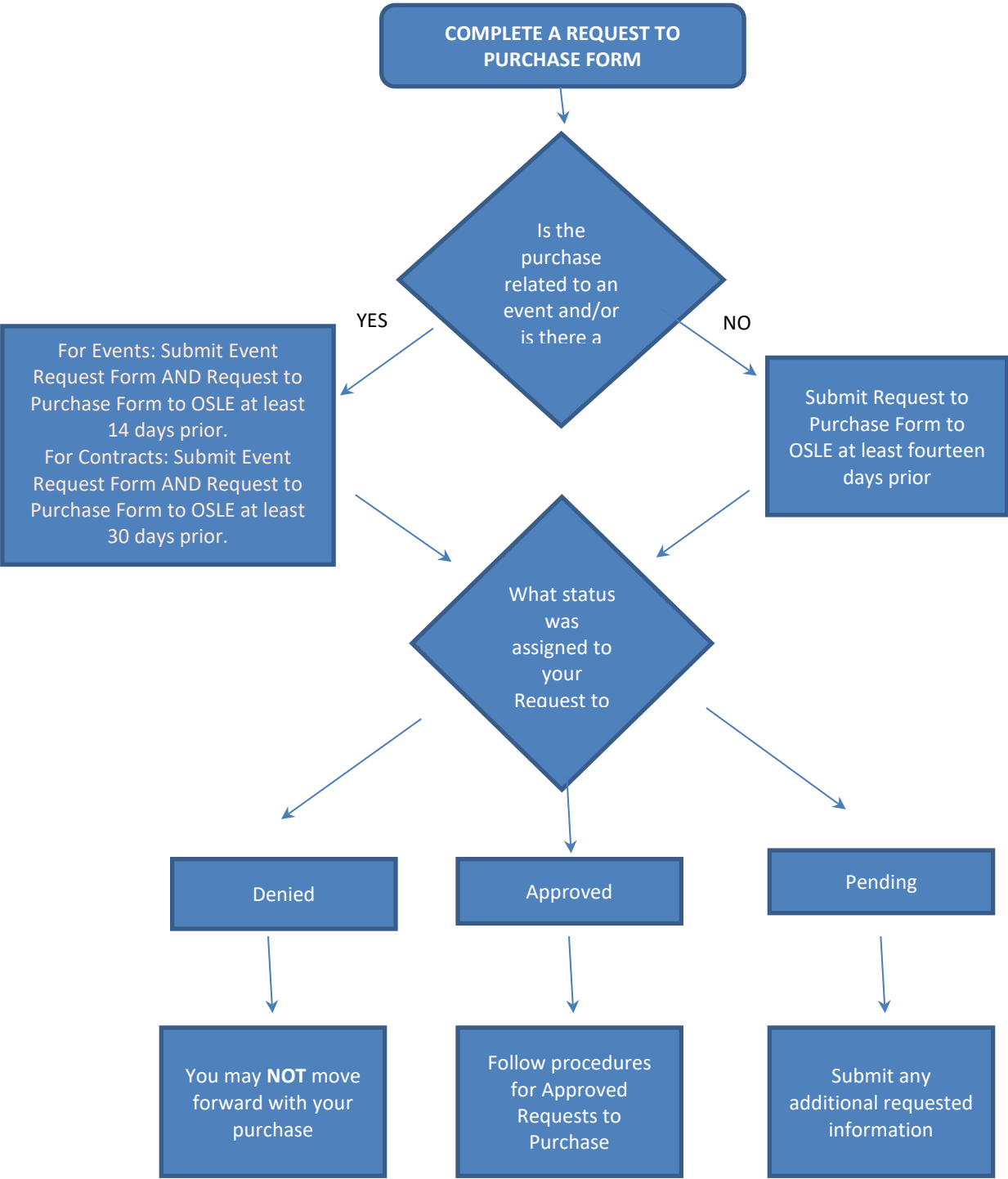
<b>Contracts</b>
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Students and advisors are NOT authorized to sign contracts for services or goods on behalf of a student organization or Thomas Jefferson University. A representative from the Office of Student Life and Engagement must review and sign all contracts and agreements for services and goods. Contracts should be submitted to the Office of Student Life and Engagement with a Request to Purchase Form as soon as possible, but no later than 30 days prior to the contracted date.

Should a student sign a contract, the student will be held personally liable for all contracted and financial agreements.

**For your convenience, please reference the Request to Purchase Flowchart (next page) to illustrate the process.**

Request to Purchase Flowchart



## Approved Requests to Purchase

For approved purchases, student organizations have the following three payment options. Whenever possible, campus services and the OSLE purchasing card should be used. When requesting to have purchases made on the OSLE purchasing card, student organizations should utilize Preferred Vendors unless the good or service is not available from those vendors (see “Section Three - Event Management” of this Student Organization Manual to view the Preferred Vendor List). The option to have a check processed should only be exercised if campus services and the OSLE purchasing card are not able to be used for an expense.

1. **Request to have campus services direct bill OSLE.**
2. **Request to have purchases made on the OSLE purchasing card.**
3. **Request to have payments be made via the OSLE Paypal account.**
4. **Request to have a check processed from their accounts and mailed to the vendor.**

**PLEASE NOTE THAT PERSONAL REIMBURSEMENT IS NOT ONE OF THE PURCHASING OPTIONS AVAILABLE TO STUDENT ORGANIZATIONS.** Students and advisors are prohibited from making purchases on their own and/or using their own money for purchases. Should this occur, the individual will not be reimbursed for the expenses and the student organization may be placed on probationary status. On rare occasions, an exception may be made at the discretion of the Office of Student Life and Engagement. In such circumstances, express written permission must be granted and communicated by an Office of Student Life and Engagement staff member via email prior to the purchase occurring. This one time exception will only be valid for the specific instance specified.

**All Request to Purchase Forms must be reconciled with the Office of Student Life and Engagement within two business days after the event.** To reconcile the Request to Purchase Form, a student organization must email [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) to account for each approved purchase. The email should include an attached receipt/invoice or by indicating in writing that the purchase was not made. Please be sure to include the student organization name and the event name/date in the email message.

**All goods must be picked up by an officer or member of the requesting organization within two weeks of notification.** Any and all goods not claimed and removed from the Student Organization Supply Closet or Office of Student Life & Engagement will be forfeited without refund.

## Payment Options - Procedures

### Tax-Exempt Status

- The University is tax-exempt, which extends to its entities, including student organizations. Student organizations are responsible for providing vendors with a copy of Jefferson's tax-exempt documentation prior to making a purchase.
- When using the tax exempt number, the transaction must not contain personal purchases. Use of the tax exempt number for personal reasons is fraud and disciplinary action will be taken.

### **Option 1: Campus Services**

Once your Request to Purchase Form has been approved, contact the corresponding campus service (e.g. Medical Media, Commuter Services, etc.) to place your order. The Office of Student Life and Engagement will provide the department with the charge code once an invoice is received. For catering orders through Nutrition and Dietetics, please see "Section Three – Event Management" in the Student Organization Manual for specific details on how to place your order.

### **Option 2: OSLE Purchasing Card**

Once your Request to Purchase Form has been approved, OSLE will provide instructions on how to proceed with making purchases and coordinating payment via the OSLE purchasing card. In some instances (most often food delivery) you are required to submit confirmation that the order has been called in at least 3 business days in advance of the purchase date and an electronic copy of your receipt to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) within 48 hours following the event. Cell phone pictures will suffice. Failure to submit receipts within 48 hours of a purchase may result in an organizational spending freeze and/or probation.

### **Option 3: OSLE Paypal Account**

Once your Request to Purchase form has been approved, contact the vendor to place your order. The vendor should send an invoice via Paypal to the Thomas Jefferson University OSLE paypal account (this can be found by searching for our account using the email [studentlife@jefferson.edu](mailto:studentlife@jefferson.edu) or by requesting a link directly from OSLE via email to [studentlife@jefferson.edu](mailto:studentlife@jefferson.edu)) OSLE will pay the invoice within 2 business days.

### **Option 4: Check Request**

**At least four weeks prior to the payment due date**, submit the documentation via your Survey Monkey Request to Purchase Form. Please email the contract, invoice, or donation letter to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) and cc your Advisor immediately following submission of your Request to Purchase.

The Office of Student Life and Engagement will complete the necessary paperwork and submit forms to Accounts Payable. The processing time for checks is approximately four weeks. Once the check is received by OSLE, the office will contact your student organization via Jefferson email that the check is available for pick up.

### **RIGHT TO MODIFY ORDERS**

Please note that should your purchase total exceed the budgeted amount approved, the Office of Student Life and Engagement reserves the right to modify the order at their discretion to resolve this. Items may be removed or quantities decreased to ensure that the purchase total does not exceed the approved budgeted amount for this expense.

We encourage you to work to get accurate costs from vendors when planning your orders and remember to account for things like delivery fees, gratuity, and/or shipping.

<b>Discount Items Available for Purchase</b>
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In an effort to provide additional support to our student organizations, the Office of Student Life and Engagement has made some bulk purchases of some of the most frequently used items by our student organizations. This allows us to offer these items to our student organizations at a reduced price and provides a convenient alternative to purchasing them from a store or vendor.

If you wish to purchase any of the following, you will need to complete the Request to Purchase Form and include your order details on that form. If these items are part of an event for which there are other items you need to purchase (e.g. catering), please include everything all on one Request to Purchase Form (you do not need to fill out multiple forms for the same event/date). The Office of Student Life and Engagement will then review the Request to Purchase and assign a status (approved, denied, or pending). For those Requests to Purchases that contain Discount Items Available for Purchase and that are approved, the Office of Student Life and Engagement will debit the corresponding total from your student organization operating account or agency account. The items will then be packaged and available for pick up from the Student Organization Cabinet located outside of the Office of Student Life & Engagement, instructions on how to access the cabinet will be provided in an email confirmation once the items have been packaged.

**As of the publishing date of the 2021-22 Student Organization Manual, the following items are available for student organizations to purchase from our office. However, please visit the Student Organization Resource Page ([www.jefferson.edu/sos](http://www.jefferson.edu/sos)) for the most up-to-date listing.**

### **PAPER PRODUCTS**

All paper products are available for purchase in packs of 25 except napkins. Napkins are available in packs of 100 to provide an estimated four napkins per person. You may order as many packs of the following paper products as you need for an event.

- Dixie 9" Paper Plates (suitable for lunch or dinner) - 25 pack for \$2.50
- Dixie 6 7/8" Paper Plates (suitable for snacks) - 25 pack for \$2.50
- Dixie 12 oz. Bowls - 25 pack for \$2.50
- Solo 10 oz. Clear Plastic Cups (cold beverages) - 25 pack for \$2.50
- Dixie Heavyweight Black Forks - 25 pack for \$1.00
- Dixie Heavyweight Black Knives - 25 pack for \$1.00
- Dixie Heavyweight Black Spoons - 25 pack for \$1.00
- White paper napkins (restaurant dispenser style) - 100 pack for \$1.00

#### **GIFTS / PRIZES**

We are able to offer you the following items at a cost. OSLE has had these items created especially for Student Organizations in partnership with brand-approved vendors.

##### **Jefferson Mug - \$6.25 each**

(15 oz. blue ceramic mug with Jefferson name and logo)



##### **Jefferson Drinking Glass - \$4.75 each**

(16 oz. clear glass with blue bottom and university name)



We are also able to provide you with clear plastic treat bags and candy to be placed inside of the mugs or drinking glasses.

**Clear Plastic Treat Bag (4" x 9 1/2" with closure tie)**

- Five or fewer bags - complimentary
- 10 pack - \$1.00

**Clear Plastic Treat Bag FILLED WITH CANDY and tied with ribbon**

- \$1.00 each
- Typically miniature chocolates such as Hershey's, Mars, or Nestle are used; non-chocolate candy may be requested
- If purchasing the above mugs or drinking glasses AND the Clear Plastic Treat Bag Filled with Candy, the treat bag with candy will be placed inside the mug or glass

**PARKING PASSES (Center City Campus Only)**

For student organizations in need of parking passes for their activities and events (e.g. to provide to an outside speaker), you may obtain them directly from our office.

- Hamilton Garage Weekday Pass - \$13.00/ parking pass
- Hamilton Garage Evening/Weekend Passes (in after 2pm on weekdays, any time Saturday/Sunday) -\$8.00/parking pass)

<b>Preferred Vendors List</b>
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The following vendors are those that our office has established Jefferson's tax-exempt status with, those we are able to use our office purchasing card at or be direct billed, and in many cases, offer a special Office of Student Life and Engagement Student Organizations discount. If a specific good or service is not available from the Preferred Vendors, please reach out to the Office of Student Life and Engagement at least one week in advance to discuss further options. Any orders delivered to OSLE must be retrieved from the Student Organization Supply Closet by the requesting Student Organization within one week of delivery confirmation. Any orders not picked up within one week will be forfeited.

**Internal Vendors (Center City Campus only)**

- Jefferson Nutrition and Dietetics (Aramark Catering)  
Cuisine/Event Type: Hot- and cold-plated served and buffet-style meals, cocktail receptions and Large-scale events, coordination for large events and conferences. Special budget-friendly menus available for Jefferson Student Organizations.  
Contact: Shelley Elliott-Williams

Phone: 215-955-8617

Email: [Shelly.Elliott-Williams@jefferson.edu](mailto:Shelly.Elliott-Williams@jefferson.edu)

- **Jefferson Bookstore**

Contact: Travis Harley

Phone: 215-503-1861

Email: [Travis.Harley@jefferson.edu](mailto:Travis.Harley@jefferson.edu)

Website: [www.jefferson.bkstr.com](http://www.jefferson.bkstr.com)

#### External Vendors – Catering (Center City campus only)

- **Barra Rossa**

Cuisine: Modern Italian

Discounts: 10% off

Location: 929 Walnut St, Philadelphia, PA 19107

Phone: 215-644-9074

Website: [www.barrarossa.com](http://www.barrarossa.com)

- **Cheu Noodle Bar**

Cuisine: Asian Infusion

Discounts: 10% Jefferson discount

Location: 255 South 10th Street, Philadelphia, PA 19107

Phone: 267-639-4136

Website: <http://cheunoodlebar.com>

- **Crunchik'N**

Cuisine: Korean food with American twists

Location: 212 S. 11<sup>th</sup> St., Philadelphia, PA 19107

Phone: 267-886-9373

Website: [www.crunchikn.com](http://www.crunchikn.com)

- **Famous 4<sup>th</sup> Street**

Cuisine: Cookies, Desserts

Location: 1107 Walnut Street, Philadelphia, PA 19107

Phone: 215-592-8242

Website: [www.toptomatopizzakitchen.com](http://www.toptomatopizzakitchen.com)

- **Federal Donuts**

Cuisine: Donuts, fried chicken, coffee

Location: 540 South Street, Philadelphia, PA 19147

Phone: 267-761-4512

Website: [www.federaldonuts.com](http://www.federaldonuts.com)

- **Fuel**



Cuisine: Healthy fast food  
Location: 1225 Walnut St., Philadelphia, PA 19107  
Phone: 215-922-3835  
Website: <http://fuelrechargeyourself.com>

- **Green Garden**

Cuisine: Chinese, Japanese, sushi  
Location: 237 S. 10<sup>th</sup> St., Philadelphia, PA 19107  
Phone: 215-351-1118  
Website: [www.greengardenrestaurantphilly.com](http://www.greengardenrestaurantphilly.com)

- **Hatch & Coop**

Cuisine: Breakfast, sandwiches, salads  
Discount: 15% off catering and free delivery  
Location: 122 S. 12<sup>th</sup> St. Philadelphia, PA 19107  
Phone: 215-922-0102  
Website: [www.hatchandcoop.com](http://www.hatchandcoop.com)

- **Masala Kitchen**

Cuisine: Indian, Kati Rolls & Platters  
Discount: Catering Menu or 15% off regular menu  
Location: 1211 Walnut St, Philadelphia, PA 19107  
Phone: 215-309-3301  
Website: [www.masalakitchenphilly.com](http://www.masalakitchenphilly.com)

- **NYPD Pizza**

Cuisine: Pizza, salads  
Location: 140 S. 11<sup>th</sup> St., Philadelphia, PA 19107  
Phone: 215-733-0651  
Website: [www.nypdpizzeriaiphiladelphia.com](http://www.nypdpizzeriaiphiladelphia.com)

- **Philly Pretzel**

Cuisine: Soft pretzels  
Location: 132 S. 11<sup>th</sup> St., Philadelphia, PA 19107  
Phone: 215-625-0910  
Website: [www.phillypretzelfactory.com](http://www.phillypretzelfactory.com)

- **QT Vietnamese Sandwich**

Cuisine: Vietnamese sandwiches, appetizers, soup  
Location: 48 N. 10<sup>th</sup> St., Philadelphia, PA 19107  
Phone: 267-639-4520  
Website: [www.qtvietnamesesandwich.com](http://www.qtvietnamesesandwich.com)

- **Saxbys Coffee**

Cuisine: Coffee, Tea, Pastries  
Discount: 10% off catering orders  
Location: 234-236 S. 11<sup>th</sup> St Philadelphia, PA 19107  
Phone: 215-309-3921

[www.saxbyscoffee.com](http://www.saxbyscoffee.com)

- **Strangelove's**

Cuisine: Gastropub

Discount: 10% off and Complimentary use of upstairs room on certain weeknights

Location: 216 S. 11<sup>th</sup> St Philadelphia, PA 19107

Phone: 215-873-0404

Website: [www.strangelovesbeerbar.com](http://www.strangelovesbeerbar.com)

- **Top Tomato**

Cuisine: Pizza, Salads, Sandwiches, Pasta

Location: 1107 Walnut Street, Philadelphia, PA 19107

Phone: 215-592-8242

Website: [www.toptomatopizzakitchen.com](http://www.toptomatopizzakitchen.com)

- **Xiandu Thai**

Cuisine: Thai, Asian fusion

Location: 1119 Walnut Street, Philadelphia, PA 19107

Phone: 215-940-8855

Website: [www.xianduthai.com](http://www.xianduthai.com)

### **External Vendors – Supplies & Groceries**

**PLEASE NOTE:** If your organization needs to buy groceries for an event, please request a gift card to a local store in your Request to Purchase form. Your organization will be responsible for picking up the gift card from our office (or receiving the e-card via email) and shopping at the store. OSLE is no longer using grocery delivery services.

- **Acme**

1001 South St., Philadelphia, PA 19147

Phone: 215-238-1108

Website: [www.acmemarkets.com](http://www.acmemarkets.com)

- **Amazon**

OSLE is an Amazon Prime member. Please be sure to look for Prime eligible items when choosing your order to avoid long shipping and additional fees.

Website: [www.amazon.com](http://www.amazon.com)

- **BJ's Wholesale Club**

2300 W. Oregon Ave., Philadelphia, PA 19145

Phone: 215-982-5440

Website: [www.bjs.com](http://www.bjs.com)

- **Costco Wholesale**

Website: [www.costco.com](http://www.costco.com)

- **Oriental Trading Company**

Website: <http://www.orientaltrading.com>

- **Staples (Center City campus only)**  
1500 Chestnut Street, Philadelphia, PA 19102  
Phone: 215-864-9520  
Website: [www.staples.com](http://www.staples.com)
- **Target (Center City campus only)**  
1128 Chestnut Street, Philadelphia, PA 19107  
Phone: 215-398-3000  
Website: [www.target.com](http://www.target.com)
- **Walgreens (Center City campus only)**  
Location: 1101 Locust Street, Philadelphia, PA 19017  
Phone: 215-629-5690  
Website: <http://www.walgreens.com>
- **Wholefoods**  
929 South St., Philadelphia, PA 19147  
Phone: 215-733-9788  
Website: [www.wholefoodsmarket.com](http://www.wholefoodsmarket.com)

## PART D - DEPOSITS

### Donations to Student Organizations

- Donations from professional association affiliations and other external sources must be received in the form of a check. Checks should be made out to Thomas Jefferson University or the student organization.
- Donations must be submitted to the Office of Student Life and Engagement **within two business days** of receipt following the “Making a Deposit” instructions below.
- If an external donor needs a tax receipt, please contact the Office of Student Life and Engagement PRIOR to making the deposit.

### Fundraising/Charitable Donations

- Fundraising monies must be submitted to the Office of Student Life and Engagement **within two business days** of the event following the “Making a Deposit” instructions below.

- Only cash, checks, paypal payments via OSLE paypal account with proper notation will be accepted.
- If the fundraising efforts were for the purposes of making a charitable donation to an external organization, then the Request to Purchase Form will also need to be completed and submitted electronically to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu). Online donations are the preferred method of payment. If that option is not available, our office will submit a Check Request through Accounts Payable for the donation.

#### **Making a Deposit**

- All funds will be deposited into the Student Organization Agency Account.
- To make the deposit, a student organization member must submit the cash and/or checks to the Office of Student Life and Engagement (Jefferson Alumni Hall, Room 105) **using the Deposit Envelope**, which can be provided at the front desk in JAH 105. The Deposit Envelope must be filled out in its entirety.

# **SECTION THREE EVENT MANAGEMENT**

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# EVENT MANAGEMENT GUIDE

This is the order in which steps need to be completed to host any type of event



1

## EVENT PLANNING

What do you want to do and why? What's your budget going to be and where is it coming from? What kind of space do you need? Do you need A/V equipment? What about catering? Who is your intended audience?

**Make sure to review the "special Circumstances" section of the Student Organization Manual before continuing**

2

## EVENT REQUEST FORM



Student Organizations must complete this form for ALL ACTIVITIES they would like to engage in, such as organizational meetings, programs, service activities, etc. This form needs to be submitted at least 10 days PRIOR to the event.

**This form must be submitted BEFORE any subsequent steps can be take - You need this approval every time.**

3

## ROOM REQUESTS



For locations assigned by Space Management you will need to access the EMS Web App. A user guide can be found in both the forms and resource sections of the Student Organization Link Canvas Course. This form must be submitted at least 5 days in advance of your event date. Any room request received without a corresponding event approval will be cancelled by Space Management.

4

## AUXILIARY SERVICES



Auiliary services are no longer requested separately from room requests. Using the EMS Web App, student organizations can now request room set-ups, A/V, and security when completing their room request. For space not assigned by Space Management please see the manual for campus partner contact information.

5

## REQUESTS TO PURCHASE



For any food or supplies you want at your event you will need to complete a request to purchase form. This form just be submitted 14 days prior to the desired purchase date AND must have an a corresponding event approval. Once approved, OSLE will provide instructions for next steps. Please be aware that person reimbursements are no longer a payment option.

6

## MARKETING



Don't forget to utilize some of these options to advertise your event:

The Wednesday Word  
Registered Social Media  
Flyers or Posters  
Broadcast Notices / TV Bulletin Board Monitor System

QUESTIONS? CONTACT [STUDENTLIFE@JEFFERSON.EDU](mailto:STUDENTLIFE@JEFFERSON.EDU)



## Event Planning

The Event Management section of this Student Organization Manual is designed to help you plan and implement successful events. Events can be many things – from a simple meeting, to a fundraiser, to community service, to a carnival – and the Office of Student Life and Engagement is here to help you throughout the process.

We have developed an Event Planning Tool to help you as you attempt to turn your ideas into reality, and to help you make your event happen as you envision.

As you plan your event, we encourage you to consider the following questions.

### **1. Event Overview - What do you want to do and why?**

- What is the event that you envision?
- What is the purpose of the event?
  - Some common ways to categorize the purpose of events include: educational, social, recreational, service, personal development, professional development, and fundraising
- Who is your intended audience/participants?
- Have you considered collaborating with another student organization on this event?
- What are your goals for this event?
- Does the event align with the mission and goals of your student organization?
- How will you ensure that your event achieves the purpose and the goals you've identified?
- What factors will you use to determine if the event was a success?
  - Some common factors include: attendance, participant satisfaction, cost per participant, assessment of goals and outcomes, etc.

### **2. Financials - What is your budget for this event?**

- What are your existing funding sources (e.g. annual allocations, agency account monies, etc.)?
- Do you need additional funds for this event?

- If yes, some options include: Special Funding, Donations, Charging a fee at an event, etc.

### 3. Event Hospitality and Logistics

- What is the type of event you are having?
  - Campus program or off-campus program (educational, social, fitness/recreational, etc.), fundraiser, community service activity, charity drive, virtual etc.
- Is your event occurring on or off-campus?
- Are there any special circumstances for this event? **(Please see Part A - Special Circumstances for Events section for reference in planning).**
- What are your space needs?
  - Specific buildings or rooms?
  - Room set-ups?
  - Audiovisual equipment?
- What are your catering needs?
  - Will you use Jefferson's Nutrition and Dietetics for catering or an external Preferred Vendor?
- Who is your intended audience / who will your participants be?
- **How can you work towards making your event inclusive?**

NOTE: As student organization officers, there are some resources available to you which are listed below that may assist you with this event planning consideration.

- **Major Religious Holidays/Observances and Suggested Accommodations Guidelines**

How to Access: On the Student Organization Support Website ([www.jefferson.edu/sos](http://www.jefferson.edu/sos)) click on Student Resources

- **Diversity & Inclusion Resources**

How to Access: Log into Canvas to access the Student Organization Link, then click on the Resource Center page

- **Thomas Jefferson University - Office of Enterprise Diversity, Inclusion, and Community Engagement**

How to Contact: Phone – 215-955-1031; Location – Sheridan Building, 5<sup>th</sup> Floor

- **Sidney Kimmel Medical College – Office of Diversity and Inclusion**

How to Contact: Phone - 215-503-6764; Location - College Building, Suite 119

- Do you need security services for your event?
- Who will be responsible for securing the needed hospitality and logistics for this event?

#### **4. Marketing**

- How will you reach your intended audience/participants to let them know about the event?
- Who will be responsible for marketing this event?

**After you have answered the above questions, the next step is to fill out an Event Request Form. Events that require a purchase must be requested at least 14 days prior to the event date, events that do not require a purchase or on campus space reservation can be submitted as late as 10 days in advance. Please see the Event Request Form segment below for additional details.**

<b>Event Request Form</b>
---------------------------

Student organizations must complete the Event Request form for ALL activity that the student organization plans to engage in. This includes, but is not limited to, organizational meetings, programs and events – either on-campus or off-campus, service activities, attending professional association events, fundraising, etc. An Event Request is required regardless of the need for a room reservation or purchase. Events not pre-registered with OSLE do not qualify as sanctioned organization business and will not be recognized by OSLE.

The Event Request Form must be submitted at least 14 days prior to the event date if a purchase is also needed, events that do not require a purchase or on campus space reservation can be submitted as late as 10 days in advance. Please see the Event request form found on the Student Organization Link Canvas Course.

*\*For events where a contract is necessary, event request forms must be submitted 30 days in advance of the proposed event date. For events where a purchase is needed, event request forms should be submitted prior to the request to purchase form.*

The Event Request Form will ask for the following information

- Student Organization Name
- Name of Person Completing this Form
- Jefferson Email of Person Completing this Form
- Position within the Student Organization
- Name of Event
- Date of Event (mm/dd/yy)
- Start Time
- End Time
- Location
- Detailed Description of Event
- How does this event support your student organization mission and goals?
- Type of Event (select one)
  - Campus Program – Community Service Activity/Charity Drive
    - Community Service Activity
    - Charity Drive\*
  - Campus Program – Educational
  - Campus Program – Fitness/Recreational
  - Campus Program - Organization Meeting
  - Campus Program – Social
  - Fundraising (non-charitable purposes)
  - Off-Campus Program – Community Service Activity / Charity Drive
  - Off-Campus Program – Educational
  - Off-Campus Program – Fitness/Recreational
  - Off-Campus Program - Organization Meeting

- Off-Campus Program – Social
- Virtual Program – Community Service Activity / Charity Drive
- Virtual Program– Educational
- Virtual Program – Fitness/Recreational
- Virtual Program - Organization Meeting
- Virtual Program – Social
- Other (please specify)
- Expected Number of Attendees
- What Population is your Event Open To? (select all that apply)
  - Community Members
  - Entire Jefferson Community (students, faculty, staff)
  - Guests of Jefferson students, faculty, or staff
  - Jefferson students only
  - Student organization members only
  - Other (please specify)
- Which Jefferson Colleges is your Event Open To? (If open to all Colleges, please select all boxes)
  - College of Health Professions
  - College of Life Sciences
  - College of Nursing
  - College of Population Health
  - College of Pharmacy
  - College of Rehabilitation Sciences
  - Sidney Kimmel Medical College
  - School of Continuing and Professional Studies
  - None of the Above (please explain)

- Please indicate whether your event will involve any of the following special circumstances
  - 100 or more Attendees
  - Alcohol
  - Amplified Sounds
  - Bake Sales
  - Balloons
  - Film Screenings
  - Financial Transactions (sales, donations, etc.)
  - Minors (individuals under the age of 18)
  - Non-Jefferson Participants (excluding any guest presenters)
  - Off-Campus Locations (Transportation)
    - If you will be transporting members of the student organization to/from the event, please select your planned method of transportation.
      - ☐ Public transportation
      - ☐ Taxi Services
      - ☐ Bus or Van Rental with Employed Driver
      - ☐ We will not be transporting members of the student organization to/from the event
    - If you will be transporting other individuals to/from the event, please select your planned method of transportation.
      - ☐ Bus or Van Rental with Employed Driver
      - ☐ We will not be transporting other individuals to/from the event
  - Outdoor Location (on-campus)
  - Physical Activity or other activity where participant may get hurt
  - Potlucks
  - None of the above

- ADDITIONAL SPECIAL CIRCUMSTANCE: Will your event involve the Practice of Medicine in any way (including health education, screenings, vaccinations, administering of medicine or health care products)?\*\*

\*Charity Drive Information (only to be completed for Campus Program - Charity Drive events)

1. What are you collecting?
2. Who are you collecting it for (e.g. name of community organization)?
3. Collection Start Date (mm/dd/yy)
4. Collection End Date (mm/dd/yy)

Note: Charity drives may run up to a maximum period of one month.

5. Student Organization Contact Person for the Charity Drive
  - a. Name
  - b. Jefferson Email

6. Locations

Note: Student organization may select up to three of the below approved locations in which to place the collection bins. Any combination of the residence halls will only count as one location; you will still be able to select two other non-residence hall locations as well.

- a. Bluemle Life Sciences Building – 1<sup>st</sup> Floor Lobby
- b. College Building – 2<sup>nd</sup> Floor Lobby
- c. Edison Building – 1<sup>st</sup> Floor Lobby
- d. Hamilton Building – 2<sup>nd</sup> Floor Lobby (near elevators)
- e. Jefferson Alumni Hall – 1<sup>st</sup> Floor Lobby
- f. Residence Halls – Barringer
- g. Residence Halls – Martin
- h. Residence Halls - Orlovitz

After completing the Event Request Form, your submission will be reviewed by the Office of Student Life and Engagement. The requesting student will receive an email to their personal Jefferson email account as to whether the event has been approved or if any additional information or modifications are necessary. **You must wait until you receive an approved status for your Event Request Form before marketing the event and requesting a room. You may submit a Request to Purchase before you receive your Event Request status email.**

After receiving an approved status for your event, reference the corresponding Financials and Event Management sections of this Student Organization Manual for additional information on how to proceed (e.g. room requests, catering services, fundraising, charity drives, etc.). All forms contained or referenced in the Student Organization Manual can be accessed in the Student Organization Link in Blackboard Learn (in the Forms section).

As a reminder, if you need to make purchases for your event, your event must be approved and you must submit the Request to Purchase Form. Additional information can be found in the Financials section of this Student Organization Manual.

**\*\*Practice of Medicine Information (only to be completed if Practice of Medicine was selected in the Special Circumstances section)**

1. Please indicate what type(s) of activity you will be engaged in
  - a. Health Education
  - b. Screenings  
(e.g. glucose, vision, blood pressure, etc.)
  - c. Procedures  
(e.g. venipuncture, administering vaccinations, medical tests, etc.)
  - d. Patient care  
(including but not limited to: patient history; physical exams; editing / updating patient information or charts; distribution or administering of medicine or health care products (including over the counter items); triage, acute care for conditions ranging from respiratory illnesses, minor injuries, musculoskeletal complaints, to gastrointestinal and genitourinary issues)
  - e. Other (please specify)
2. Please provide additional details and information on the specific activities that your student organization members will be engaged in at this event



3. Please provide the contact information for the Jefferson affiliated licensed physician that will be onsite with your group (not required for Health Education activities)
  - a. First Name
  - b. Last Name
  - c. Credentials (e.g. MD)
  - d. Email
  - e. Phone Number

## PART A – SPECIAL CIRCUMSTANCES FOR EVENTS

### 100 or More Attendees at Event

For large scale events with 100 or more anticipated attendees, student organizations must notify Campus Safety and Security.

On the Center City campus, students will have the opportunity to note this on the room reservation form which will automatically notify Campus Safety and Security once a space has been assigned.

### Alcohol Policy

**NOTE: For events where there will be alcohol, the student organization advisor must be present for the duration of the event.**

Thomas Jefferson University does not endorse the use of alcohol at student functions. However, student organizations may decide that it is appropriate to serve alcohol after carefully considering all circumstances. Any organization or group of students that sponsors an event where alcohol is served must conform to this *Policy*.

#### **Policy Statement**

The laws of the Commonwealth of Pennsylvania regulate the sale, service, possession and consumption of alcoholic beverages on Jefferson's Campus. All members of the University community are responsible for knowing, understanding, and obeying these laws, regulations, and ordinances. The University does not have the authority to alter the laws or to secure exemption from them.

- In accordance with Pennsylvania law, no individual under 21 years of age [i.e. legal age] may possess or consume alcoholic beverages in or on University property. Persons 21 years of age or

older may possess and consume alcohol within the privacy of their on-campus residences. The University neither condones nor shields from prosecution the actions of those individuals who serve alcohol to persons under the legal age in violation of Pennsylvania law.

The use of alcoholic beverages at social functions for students at Jefferson is restricted to those functions open to members of sponsoring organizations and their invited guests, where the service of alcohol is restricted to areas designated by the authorizing body, as defined below. In all cases, state laws governing the dispensing of alcoholic beverages must be observed.

### **Authority to Use Alcohol**

No alcohol is to be consumed by any student in any common campus area without permission to do so from the appropriate authority. Alcohol may not be served at outdoor locations on campus. Exceptions may be made only by the Office of the President.

Student organizations seeking to hold a function where alcohol is to be present must indicate that on the Event Request Form submitted to the Office of Student Life and Engagement. Student organizations may not move forward with plans for the event until approval is received from the Office of Student Life and Engagement. For events taking place in the University's Housing facilities, additional approval must be obtained from the Department of Housing and Residence Life by completing the Lounge Reservation Form.

The Student Organization Advisor must be present for the entirety of the event and may not consume any alcohol.

### **Disciplinary Action**

Any student who violates this *Policy* will be subject to disciplinary action, as outlined in the individual colleges' catalogs and student handbooks. Violation of this *Policy* may result in suspension or dismissal from the University.

### **Procedure**

If the appropriate authority permits the consumption of alcohol at any student function at Thomas Jefferson University, then the following procedures, as well as any additional procedures required by the sponsoring organization or the University, must be followed.

#### **A. Promotional Literature**

1. The University will not distribute, post, or mail any student function's advertisements that mention alcohol.
2. The sponsoring organization will post a legible sign at the function stating that individuals under the age of 21 years or those who appear to be intoxicated will not be permitted to consume or possess alcoholic beverages. This poster will be placed in a clear and conspicuous location at all functions where alcohol is served. The poster will read as follows:

No one under 21 years of age or who appears to be intoxicated will be served an alcoholic beverage. Any individual requesting alcohol must, prior to being served, show a photograph identification that includes the date of birth. Noncompliant individuals will be asked to leave the premises immediately. This may include anyone over 21 years of age serving alcohol to someone under 21 years of age.

## **B. Party Procedures**

1. Only those beverages served by the sponsoring organization are allowed at the event.
2. Non-alcoholic beverages, such as soda, must be made available at no cost to anyone attending the event.
3. Alcohol will not be sold by the sponsoring organization.
4. The sponsor will ensure that identification is provided at the point of service of alcohol [please refer to *Promotional Literature*, item #2].
5. No one under the age of 21 years will be permitted to serve alcohol.
6. The sponsoring organization or group will have full discretion to refuse to serve alcoholic beverages to anyone whose age is questionable, or who is suspected of being "under the influence."
7. The sponsoring organization or group will provide sufficient food for all persons present.
8. The service of alcohol will be discontinued at least thirty minutes prior to the end of the event.
9. At any function where alcoholic beverages are served, at least one person will be formally designated by the sponsoring group to be responsible for ensuring adherence to these procedures.

## **C. Underage Student/Guest Participation**

Students or guests under the age of 21 years may be allowed to participate at these functions pursuant to the following procedures:

1. Underage attendees will not consume or possess any alcoholic beverages anywhere within University property; and
2. Any attendee who attempts to provide an alcoholic beverage to someone under 21 years of age will be removed from the event and will face disciplinary action, including the possibility of suspension or dismissal from the University.

## **D. Guest Responsibility**

1. Jefferson students are responsible for their guests at all times.
2. If a guest violates this *Policy* or any other rule, or displays unruly/inappropriate behavior, he or she will be asked to leave the event. In that instance, the Jefferson student who brought the "offender" may also face expulsion from the event and/or disciplinary action.

## **E. In the Event of an Incident**

1. Security will be notified by the event's sponsor if there are problems related to the enforcement of this *Policy* [e.g. if an individual refuses to leave, or if a disturbance develops].

2. An *Incident Report* will be written for any alcohol-related incident. These reports will be sent to the designated student affairs officer of the student's college for review and possible disciplinary action.

## **F. Organizations**

A student organization sponsoring an event where alcohol will be served may not use the Jefferson name to advertise alcohol at the event.

### **Amplified Sound**

Amplified sound is any sound that is enlarged through speakers, microphones, or other means.

Music, speakers, fairs, festivals, celebrations and other activities serve to contribute to the quality of campus life. However, the use of amplified sound by student organizations shall not disrupt the central academic mission of the University. Student Organizations are NOT permitted to use amplified sound during weekdays at gatherings in outdoor or indoor areas that could disturb classes or university business. Outside of regular business hours, or special events approved by OSLE, amplified sound should not substantially disrupt university residential areas and the surrounding city neighborhood.

### **Bake Sales**

Student organizations hosting bake sales and/or potlucks must post the following notice on a sign at the event:

“Please note that the food at this event may have been prepared by individuals in their home kitchens and may contain allergens. Consume at your own risk.”

### **Balloons**

Balloons must be securely fastened to a weighted object and may not be released by any individuals or organizations at events.

Additionally, at the Center City campus, latex balloons are not permitted due to latex allergies. Mylar balloons are permitted.

### **Campus Disruption Policy**

Because the rights of free speech and peaceable assembly are fundamental to the democratic process, OSLE supports the rights of all recognized student organizations to express their views or to protest against actions and opinions with which they disagree.

All members of student organizations also share a concurrent obligation to maintain on the campus an atmosphere conducive to scholarly pursuits, to preserve the dignity and seriousness of University ceremonies and public exercises, and to respect the rights of all individuals.

The following regulations are intended to reconcile these objectives.

It is a violation of policy for a student organizations to:

1. Prevent or disrupt the effective carrying out of a University function or approved activity, such as lectures, meetings, interviews, ceremonies, the conduct of University business in a University office, and public events.
2. Obstruct the legitimate movement of any person about the campus or in any University building or facility.

Members of student organizations have an obligation to leave a University building or facility when asked to do so in the furtherance of the above regulations by a member of the University community acting in an official role and identifying himself or herself as such. Members of student organizations also have an obligation to identify themselves when requested to do so by such a member of the University community who has reasonable grounds to believe that the person(s) has violated section (1) or (2) of this policy and who has so informed the person(s) of said violation.

The policy has been applied to the following actions by student organizations: refusal to leave a building which has been declared closed; obstructing the passage into or out of buildings by sitting in front of doorways; preventing University employees from entering their workplace; preventing members of a class from hearing a lecture or taking an examination, or preventing the instructor from giving a lecture, by means of shouts, interruptions, or chants; refusing to leave a closed meeting when unauthorized to attend; and intruding upon or refusing to leave a private interview.

It should be understood that while the above are examples of extraordinarily disruptive behavior, the application of the Policy also takes situational factors into consideration. Thus, for example, conduct appropriate at a political rally might constitute a violation of the Student Organization Policy on Campus Disruptions if it occurred within a classroom.

### **Charity Drive Information**

As a student organization, you may wish to host a charity drive in which you would collect donated items for a specific cause or community organization.

Please review the following guidelines for student organization charity drives.

- Student organizations must use the approved collection bins provided by the Office of Student Life and Engagement. Each collection bin must have a completed Charity Drive Sign on the front, which will be provided to you by the Office of Student Life and Engagement.
- Charity drives may run for up to a maximum period of one month.

- Throughout the charity drive period, the collection bins must be emptied at least once a week or more often if needed (bins should not remain full or overflowing).
- At the end of the charity drive period, the student organization is responsible for collecting all remaining donations from the collection bin and returning the bin to the Office of Student Life and Engagement within two business days. If a collection bin is not returned to the Office of Student Life and Engagement a replacement fee will be charged to the student organization.
- A maximum of three charity drives may occur in a given space at the same time.
- Student organizations should be willing to collaborate with another organization should there be interest in similar causes.
- Collection bins may only be placed in approved locations on campus. Student organizations may select up to three of the below approved locations in which to place the collection bins. A maximum of one bin may be placed in each of the selected approved locations.
  - Bluemle Life Sciences Building – 1<sup>st</sup> Floor Lobby
  - College Building – 2<sup>nd</sup> Floor Lobby
  - Edison Building – 1<sup>st</sup> Floor Lobby
  - Hamilton Building – 2<sup>nd</sup> Floor Lobby (near elevators)
  - Jefferson Alumni Hall – 1<sup>st</sup> Floor Lobby
  - Residence Halls (Orlowitz, Barringer, Martin)

*Note: Any combination of the residence halls will only count as one location; you will still be able to select two other approved locations if desired. For example, you may select to place the collection bins in the Residence Halls and utilize all of the spaces – Orlowitz, Barringer, and Martin - and still select two other approved locations such as Edison Building – 1<sup>st</sup> Floor Lobby and Jefferson Alumni Hall – 1<sup>st</sup> Floor Lobby.*

To host a charity drive, the student organization would need to first complete and submit an Event Request Form to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) (please see the corresponding segment of this Student Organization Manual for additional information). Once your charity drive event request is approved, stop by the Office of Student Life and Engagement to pick up the collection bins.

<b>Film Screenings</b>
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Film screenings are governed by the federal Copyright Act. Any student organization wishing to show a motion picture or other video must first receive approval from the Office of Student Engagement / Office of Student Life and Engagement to ensure compliance with the Copyright Act.

Please see the following information below as published by the Motion Picture Licensing Corporation (<http://www.mplc.org/page/about-copyright-law>):

Motion pictures and other audiovisual works that are available for rental or purchase are intended for personal, private, home use only. If you wish to show the work in any other place, you must have a *separate* license that specifically authorizes the public performance of that work.

These rules are detailed in the federal Copyright Act, as amended, [Title 17 of the United States Code](#).

- According to The Copyright Act, only the copyright owner holds the exclusive right, among others, “to perform the copyrighted work publicly.” (Section 106)
- The rental or purchase of a motion picture or other audiovisual work does not bear the right to perform the copyrighted work publicly. (Section 202)
- Films may be shown without a separate license in the home to “a normal circle of family and its social acquaintances” (Section 101) because such showings are not considered “public.”
- Films may be shown without a license to non-profit educational institutions for “face-to-face teaching activities” because the law provides a limited exception for such showings. (Section 110(1))
- All other public performances of motion pictures and other audiovisual works are illegal unless they have been authorized by license. Even “performances in ‘semipublic’ places such as clubs, lodges, factories, summer camps and schools are ‘public performances’ subject to copyright control.” (Senate Report No. 94-473, page 60; House Report No. 94-1476, page 64).
- Both for profit organizations and non-profit institutions must secure a license to show films, regardless of whether an admission fee is charged. (Senate Report No. 94-473, page 59; House Report No.94-1476, page 62)

Non-compliance with the Copyright Act is considered infringement and carries steep and significant penalties for both the exhibitor and anyone that contributes to the infringing conduct. Unlicensed public performances are federal crimes and can be subject to a \$150,000 penalty per exhibition and other penalties (Sections 502-506).

Please see below for the above referenced Section 110 (1) - Exemption of certain performances and displays (<http://www.copyright.gov/title17/circ92.pdf>):

Notwithstanding the provisions of section 106, the following are not infringements of copyright:

Performance or display of a work by instructors or pupils in the course of face-to-face teaching activities of a nonprofit educational institution, in a classroom or similar place devoted to

instruction, unless, in the case of a motion picture or other audiovisual work, the performance, or the display of individual images, is given by means of a copy that was not lawfully made under this title, and that the person responsible for the performance knew or had reason to believe was not lawfully made.

#### **Financial Transactions (sales, donations, etc.)**

Student organizations must note when financial transactions are taking place at an event in the appropriate place when requesting a room through the EMS web app. A notification will automatically be sent to the Safety and Security Department once a room has been assigned. Please refer to the Campus Safety and Security segment in the Event Management Section for additional information.

#### **Minors (individuals under the age of 18)**

Events involving minors will need to be reviewed on an individual basis and may require a consultation with Risk Management. Agreements or waivers may need to be signed by the appropriate parties. Please provide as many details as possible on the event and the involvement of the minors when completing the Event Request Form.

#### **Non-Jefferson Participants (excluding any guest presenters)**

For events where there will be non-Jefferson participants, the following must be adhered to

- The student organization advisor must be present for the duration of the event.
- Student organizations must note when non- Jefferson participants (excluding any guest presenters) will be in attendance in the appropriate place when requesting a room through the EMS web app. A notification will automatically be sent to the Safety and Security Department once a room has been assigned. Please refer to the Campus Safety and Security segment in the Event Management Section for additional information.

#### **Off-Campus Locations (Transportation)**

When members of a student organization must travel for organization business (e.g. an event sponsored by the student organization), public transportation, taxi services, or a bus or van rental with an employed driver **MUST** be used. **The use of rental vehicles without an employed driver or the use of personal vehicles is not permitted.**

Student organizations are not permitted to transport minors (individuals under the age of 18), and may only transport third-party adults via a bus or van rental with an employed driver.

Student organizations that are in need of mass transit or parking tickets for an event may reach out to Jefferson's Commuter Services Office for additional information and pricing. Provided you have an



approved Request to Purchase form on file for the event in the Office of Student Life and Engagement, you may move forward with ordering mass transit or parking tickets (see “Section Three – Financials” of the Student Organization Manual for additional information on purchasing). You will ask the Commuter Services Office to bill the charges to the Office of Student Life and Engagement (Student Organizations).

We have also compiled a list of some local transportation options for your reference.

#### **Bus Rental**

- Krapf’s Coaches – 215-569-2001 – [www.krapfbus.com](http://www.krapfbus.com)
- Sague Bus - 610-828-5776 – [www.saguebus.com](http://www.saguebus.com)
- Starr Tours – 215-745-7155 – [www.starrtours.com](http://www.starrtours.com)
- Yellowbird Bus Company – 215-289-1022 – [www.yellowbirdbus.com](http://www.yellowbirdbus.com)
- Academy Charter Bus - 609-265-2400 – [www.academybuscharter.com](http://www.academybuscharter.com)
- Werner Coach – 1-800-532-9800 – [www.wernercoach.com](http://www.wernercoach.com)
- First Student Charter Bus - 855-272-3222 – [www.firstcharterbus.com](http://www.firstcharterbus.com)

#### **Public Transportation**

- Amtrak – 1-800-872-7245 – [www.amtrak.com](http://www.amtrak.com)
- New Jersey Transit – 1-800-772-2222 – [www.njtransit.com](http://www.njtransit.com)
- PATCO – 856-772-6900 – [www.ridepatco.org](http://www.ridepatco.org)
- SEPTA – 215-580-7800 – [www.septa.org](http://www.septa.org)
- Septa subway and bus passes may be purchased through OSLE

#### **Car Service**

- Uber, Lyft – Download apps from AppStore, Google Play, or Windows Store
- Request for a gift card using the Request to Purchase form

### **Outdoor Location (on-campus)**

For events that will take place at an outdoor location on-campus, the following must be adhered to.

- Student organizations must submit a Campus Safety and Security Notification Form. Please refer to the Campus Safety and Security segment in the Event Management Section for additional information.

### **Physical Activity or other activity where participant may get hurt**

Events involving physical activity or other activity where a participant may get hurt will need to be reviewed on an individual basis and may require a consultation with Risk Management. Agreements or waivers may need to be signed by the appropriate parties. Please provide as many details as possible on the event and the involvement of the minors when completing the Event Request Form.

## Potlucks

Student organizations hosting bake sales and/or potlucks must post the following notice on a sign at the event:

“Please note that the food at this event may have been prepared by individuals in their home kitchens and may contain allergens. Consume at your own risk.”

## Practice of Medicine

Practice of Medicine includes but is not limited to the following:

- Screenings (e.g. glucose, vision, blood pressure, etc.)
- Procedures (e.g. venipuncture, administering vaccinations, medical tests, etc.)
- Patient care (including but not limited to: patient history; physical exams; editing / updating patient information or charts; distribution or administering of medicine or health care products, including over the counter items; triage, acute care for conditions ranging from respiratory illnesses, minor injuries, musculoskeletal complaints, to gastrointestinal and genitourinary issues)

Student organizations that plan to engage in the “practice of medicine” must have a Jefferson affiliated licensed physician onsite and oversee the activities of the individuals participating on behalf of the student organization. Student organizations must provide the Office of Student Life and Engagement (via the Event Request Form) with the contact information for the Jefferson affiliated licensed physician that will be onsite with their group. For recurring events, one or more Jefferson affiliated licensed physicians must sign an agreement committing to be present at practice of medicine events in order for the events to be approved. The names of the specific licensed physician(s) to be present at each individual event must be submitted prior to event start time. Activities pertaining solely to health education are exempt from this requirement.

This policy has been established to protect both you and the individuals with whom you are engaging in the practice of medicine. Safe, quality patient care must always take priority over the educational or service endeavor.

## PART B – HOSPITALITY AND LOGISTICS

### Room Requests

#### **Spaces Managed by Academic Services (Space Management and Room Reservations)**

The Office of Student Life and Engagement (OSLE) and the Academic Services division of Space Management and Room Reservations (SM&RR) have collaboratively established a process for student organizations to request space on the Center City campus.

Due to the high demand for space on campus and the academic needs of the University, student organizations may not reserve spaces managed by Academic Services (SM&RR) for the following types of events or activities:

- Fitness or wellness activities including but not limited to such things as yoga, meditation, Zumba, and self-defense. For these events, please follow the protocol for Spaces Managed by the Recreation and Fitness Center OR Spaces Managed by Department of Housing and Residence Life.
- Music rehearsals including but not limited to the playing of instruments and individual or group singing. For these events, please follow the protocol for Spaces Managed by Department of Housing and Residence Life.

The following spaces may be considered for student organization events, but please note that all spaces are subject to the Academic Services' Space Management/Room Reservation Protocol:

- Bluemle Life Sciences Building (BLSB)
  - Room 101 and the Lobby
  - Room 105\*
  - Room 107\*

*\*Rooms 105 and 107 have a removable divider wall which may be put away to create a larger space, which may be reserved as 105/107.*

- College Building
  - Foerderer Auditorium in McClellan Hall
  - Herbut Auditorium
  - Room 707
- Curtis Building: Room 218
- Hamilton Building

- 4<sup>th</sup> Floor Terrace
- Connelly Auditorium\*
- 1<sup>st</sup> Floor Lobby\*
- Rooms 201-226, 504, 505, 624, 625, 628, 635
- 2<sup>nd</sup>, 5<sup>th</sup>, and 6<sup>th</sup> Floor Lobbies
- Lubert Plaza

*\*From Monday-Friday, these spaces are only available after 3:30pm.*

**PLEASE NOTE:** Space in the Hamilton Building is in high demand and is often used for high profile events; as such, space in the Hamilton Building will be assigned at the discretion of the SM&RR. We encourage you to consider space in Jefferson Alumni Hall as your 1<sup>st</sup> option when completing the Room Request Form.

- Jefferson Alumni Hall (JAH)
  - 1<sup>st</sup> Floor Lobby
  - Rooms 207, 307, 407
  - Atrium (Center, East Wing, West Wing)
  - Eakins Lounge
  - Courtyards (East, West)
  - Brent Auditorium
  - Mezzanine Lobby
  - Rooms M23\*, M24\*,
  - Rooms M21\*\*, M25\*\*

*\*Available only between 8:00am and 9:00 pm, Monday-Friday.*

*\*\*Available only between 8:00am and 5:00pm, Monday-Friday.*

**All room requests for student organizations must follow the process outlined below. Student organizations are not permitted to circumvent the process by having their advisor or another staff/faculty member submit the reservation directly to SMRR on their behalf. Any student organization found doing so may be placed on probation.**

**All room requests must be submitted by the student organization at least 5 days in advance of the event date. This is to allow sufficient time for SMRR to process your request while still meeting the needs of other entities at the University. Please ensure that you coordinate requests with the other officers in your student organization to avoid duplicate requests being submitted. If room requests are submitted prior to receiving an event approval email from OSLE those requests are subject to be cancelled by space management.**

#### **Event Request & Room Reservation WorkFlow – Student Organizations, OSLE, SMRR**

1. Student organization officer submits an Event Request Form (at least 14 days in advance of the event)

2. OSLE approves/denies the event request
  - a. Approval emails sent to the student organization will include the link to reserve space on the EMS Web App
  - b. SMRR will be copied on the approval email from OSLE
3. Room request submitted by a student organization officer on the EMS Web App **at least 5 days in advance of the approved event date**
4. SMRR receives the request and cross checks with OSLE event approval emails
5. SMRR approves/denies the room request and sends the student organization & OSLE a confirmation email

**To request a room reservation on the Center City Campus, please follow these steps:**

1. To reserve space on campus, visit the new EMS Web App at <https://emscal.jefferson.edu/emswebapp>
  - a. This online room reservation tool allows users to request space, custodial setups, and AV resources all in one place.
  - b. Detailed instructions on how to use the EMS Web App can be found online accessing the following pathway: Canvas □ Student Organization Link □ Files □ Guides □ “OSLE EMS Web App Guide.pdf”
2. Logging in to the EMS Web App as a student organization
  - a. In order to log into the EMS Web App, student organization officers must use their student organization email and password (same as email log in)
  - b. Click on “Welcome Guest” at the top right hand corner then click “Sign In”
3. Browsing available spaces
  - a. Click the “Locations” tab on left hand side on the EMS Web App home page
  - b. To see more information about available rooms (features, seating arrangements, capacities), click on the name of each listed room; scroll through dates to see room availability
4. Creating a reservation
  - a. Click on “Create a Reservation” on the left hand side of the page to bring you to the “My Reservation Templates” screen
  - b. Click “book now” to go to the next step where you will be able to browse and select a room to reserve
5. Selecting your rooms

- a. Choose the date and time needed for your reservation
  - b. Click on the name of the room to view details; click the “+” button to add the room to reserve; add the number of attendees expected, select the seating arrangement; click “Add room”; Click “Next Step” to move on
6. Reservation details
  - a. For “Event Name”, enter “Student Organization – YOUR EVENT TITLE” (please use the same event title listed in your Event Request)
  - b. For “Event Type”, select from the drop down box
  - c. For “Group”, select Office of Student Life & Engagement
  - d. Contact information listed should be for an officer of the student organization
  - e. Answer security info questions
  - f. Click on “Create Reservation”
  - g. Once the reservation is created, the following message will appear: “YOUR BOOKING IS NOT CONFIRMED UNTIL SMRR APPROVES IT”; you will receive an email from SMRR once the space is confirmed.
7. Managing your room requests
  - a. Click on “My Events” on the left hand side of the page to view a listing of your active reservations; click on the name of your reservation to open and view details
  - b. This section allows you to edit information about the reservation, add services, and modify multiple bookings at once
  - c. Each room request will receive a code number. Please reference this number if you need to contact SMRR about your reservation.

**IMPORTANT NOTES:**

- Event requests and room requests will be available to student organizations August 16<sup>th</sup>, 2021
- Room requests may be submitted through the EMS Web App after the student organization has successfully completed the Annual Registration Process, been assigned their status for the academic year, and received their organization’s email and password.
- All space requests will be considered based on availability. Student organizations may be asked to relocate to allow the University to meet other space demands (i.e. President’s Office, donor events, high-profile events, etc.).
- Incomplete room requests or requests without corresponding event approval from OSLE will not be processed by SMRR.

- Student organizations needing additional services for reserved spaces may be charged fees (evening or weekend events, special requests, etc.). Some services may be mandatory (i.e. security).
- If the time or date of your event needs to be changed after the room confirmation has been received, please log into the EMS Web App to edit/manage your requests.
- For organizations on the Abington-Dixon campus – to reserve rooms on your campus please contact your advisor.

### **Spaces Managed by Department of Housing and Residence Life**

If an officer or member of your student organization is a resident in University Housing they may reserve one of the social lounges or the solarium for a student organization meeting or event. The resident student who makes the reservation will be responsible for all of the people in attendance to ensure they follow the rules and do not wander around the building. Please see the Department of Housing and Residence Life's (DHRL) policy for reserving space below:

- The Assistant Director of Residential Life maintains and approves all reservations for the use of common area space in the residence halls.
- Resident students can reserve these lounges, free of charge. To reserve one of these areas please log into the Housing Portal and click on "Building Resources." Once on this page you can find the space you want to reserve and create a reservation. Once a reservation has been made, the resident host will receive a confirmation email with the reservation details. Reservations will be granted in order of inquiry via the completed reservation form. Reservation requests must be submitted five business days prior to the date of the intended event. The resident host will receive an email regarding the confirmed reservation.
- Residential Life and Departmental events will take priority over other events in the event of a scheduling conflict.
- All visiting students, staff and faculty will be asked to sign in and show proper identification at the security desk of each residence hall.
- The reservation form contains an alcohol permit section. Alcohol may be served at events when written approval and an alcohol permit has been received from Office Residential Life. To request approval to serve alcohol at an event in the residence halls, contact the Assistant Director of Residential Life at (215) 955-1755.
- Approval for serving alcoholic beverages at a resident sponsored event will be dependent on the nature of the scheduled event, expected attendance and adherence to ORL procedures.
- There will be no alcohol approval for gatherings with over 25 persons (residents and non-residents) and 50 persons (if all are building residents.)

- **No alcohol is permitted in the Martin Solarium.**
- The quantity of alcohol permitted will be reasonably limited based on the actual attendance at an event. The resident sponsor must adhere to the policies and procedures contained in the Student Alcohol Policy (117.03).
- ORL reserves the right to monitor the event and take any action necessary to ensure the security of the participants, residents and facilities. Any unapproved group gatherings in the lounge where alcohol is present will be immediately terminated and students may be subject to disciplinary action.
- Residents are expected to clean up after the event. Residents are to conduct themselves responsibly while using the lounges and terminate events by 11:00 p.m. With the written permission of the Assistant Director of Residential Life, exceptions can be made to the 11:00 p.m. time.
- Residents using the Barringer lounge for general purposes must register with the Front Desk. Abuse of the lounge may result in termination of reservation privileges and/or other disciplinary action.
- Should a reservation time conflict with general resident occupancy of either lounge, the person with the reservation obtains priority use of the lounge. A schedule of lounge reservations is available online at each building's Front Desk computer.
- Non-University affiliated groups are not permitted to reserve common area space in the residence halls. Groups found violating this policy will not be permitted to use the space for future events and may be subject to disciplinary action.

#### **Spaces Managed by the Recreation and Fitness Center**

The Jefferson Recreation and Fitness Center allows reservations of the gymnasium, swimming pool and group exercise studio as outlined below.

- Only Jefferson Recreation and Fitness Center members and Jefferson students may reserve the recreation facilities. Any person involved in the event who is not a member of the Jefferson Recreation and Fitness Center must pay a guest fee of \$10. Guest restrictions apply.
- The recreation areas may not be reserved during peak hours Monday through Friday (peak hours include 11:00am – 2:00pm and 4:00pm – 7:00pm). Additionally, due to the large number of intramural activities in the fall and spring, no reservations will be approved after 4:00 pm at all, Monday through Thursday.
- Approval is dependent upon the number of previously approved reservations and the scheduled Recreation and Fitness Center activities and programs.



- Only parties of eight or more may reserve the full gymnasium. Parties of seven or less will be limited to half court.

Submit your room request **at least SEVEN (7) BUSINESS DAYS in advance of your event**. Please note that requests submitted less than seven business days in advance will not be accepted nor approved. Please ensure that you coordinate requests with others in your student organization to avoid duplicate requests from being submitted. Please note that room requests are not guaranteed.

Please complete the form below and submit via email to [justin.holman@jefferson.edu](mailto:justin.holman@jefferson.edu) with a copy of your event approval email from OSLE. All fields of the form must be completed. For additional information or questions, please contact Justin Holman at the email above or by calling 215-503-7949.

<b>ROOM REQUEST FORM – SPACES MANAGED BY RECREATION AND FITNESS CENTER</b>	
Student Organization Name:	
Student Organization Affiliation <input type="checkbox"/> Entire Jefferson Community <input type="checkbox"/> All Jefferson Students <input type="checkbox"/> College Specific (e.g. SKM Only, etc.)	
Requestor's Name:	Requestor's Campus Key:
Requestor's Jefferson Email:	Requestor's Phone:
Event Name:	
Event Category: <input type="checkbox"/> Academic <input type="checkbox"/> Community Service <input type="checkbox"/> Social	
Brief Description of the Event:	
Event Date:	
Exact Event Start Time:	Set-Up Start Time:
Exact Event End Time:	Breakdown Completion Time:
Expected # of Attendees:	
Does your event include non-Jefferson participants? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If yes, please provide additional details:</i>	
Space Requested  <input type="checkbox"/> Gymnasium <input type="checkbox"/> Group Exercise Studio	
By signing the Reservation Form, you knowingly and voluntarily waive and release Thomas Jefferson University, its officers, employees, and students from any liability or claim for damages as a result of any injury or loss sustained during your reserved activity. The organization representative also accepts full financial responsibility for any damages and losses incurred.  <b>Electronic Signature:</b>	

### **Spaces Managed by the Scott Memorial Library**

The Scott Memorial Library manages a variety of spaces to support the mission of the University by providing computer access to faculty and students.

Spaces which may be reserved include:

#### Teleconference Room

- Scott Memorial Library, Room 200A

#### Computer Classrooms

- Scott Memorial Library, Room 306
- Scott Memorial Library, Room 307
- Jefferson Alumni Hall, Rooms M13A and M13B
- Jefferson Alumni Hall, Room 311

#### Specialized Computer Classrooms

- Jefferson Alumni Hall, Room 509
- Hamilton Building, Room 616

For additional information on each of these spaces and to view reservation policies please visit:

<http://library.jefferson.edu/tech/classrooms.cfm>

To submit a classroom reservation request, complete the online reservation form:

([http://library.jefferson.edu/tech/reserve\\_classrooms.cfm](http://library.jefferson.edu/tech/reserve_classrooms.cfm)).

**NOTE: After you have received your room reservation confirmation, you may proceed with submitting requests for auxiliary services room set-ups, audiovisual equipment, and security.**

### **Virtual Events Through OSLE Zoom Account**

The Office of Student Life and Engagement has created a Zoom account for Student Organizations to use for virtual meetings and events during the COVID-19 pandemic. Please note the following important information.

- OSLE's account can accommodate meetings with up to 300 people and with no meeting duration maximum.
- **Zoom does NOT allow a user to host multiple meetings at the same time.** Please check the meetings tab to view already scheduled meetings and plan accordingly.
- **The OSLE Zoom account is shared between all registered student organizations** for the sole purpose of organizational business.
- Students are **NOT permitted** to change account settings including passwords, membership level, etc.
  - Should any account setting changes be made, Zoom access for that student organization will be revoked immediately, and may lead to the shutdown of the account overall for all student organizations.
  - Please note that student organizations ARE permitted to determine the settings for their own individual meeting that they schedule (this is done in the Schedule a Meeting tab).
- It is important for student organizations to understand that Thomas Jefferson University's Community Standards are applied to any and all activity that takes place during use of the shared Zoom account. The current community standards can be access at [www.jefferson.edu/handbook](http://www.jefferson.edu/handbook) under the university policies section
- **Any meetings/events that take place on Zoom should be registered with OSLE in advance.**

<b>Room Set-Ups</b>
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Room set-ups will be addressed in the room request form found on the EMS Web app. Please provide information about how your room should be set up when filling out that form. The information will be automatically sent to facilities once a room has been assigned.

For room set-up or other custodial issues that arise during the course of an event, please contact the appropriate supervisor listed below.

**College & Curtis Buildings (before 5:00pm)**

Nathan Wright

Office Phone: 215-955-6997

Cell Phone: 267-285-6360

Fax: 215-923-4522

Email: [nathan.wright@jefferson.edu](mailto:nathan.wright@jefferson.edu)

**Bluemle & Edison Buildings (before 5:00pm)**

Heath Stewart

Office Phone: 215-503-4465

Cell Phone: 267-250-4153

Fax: 215-503-4466

Email: [heath.stewart@jefferson.edu](mailto:heath.stewart@jefferson.edu)

**Jefferson Alumni Hall & Hamilton Building (before 5:00pm)**

Maria Gaynor

Office Phone: 215-955-6846

Fax: 215-923-1402

Email: [maria.gaynor@jefferson.edu](mailto:maria.gaynor@jefferson.edu)

**All Buildings AFTER 5:00pm**

Walter Peeler

Cell Phone: 215-300-1435

Fax: 215-503-4398

Email: [walter.peeler@jefferson.edu](mailto:walter.peeler@jefferson.edu)

<b>Audiovisual Equipment (A/V)</b>
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A listing of audiovisual equipment/services and pricing can be found at:

<http://www.jefferson.edu/university/teaching-learning/av-classroom-support/av-services/audiovisual-price-list.html>.

Fees will be waived for basic audiovisual equipment for student organizations for events during normal business hours. If you require equipment or services that have fees attached, please fill out a request to purchase with the estimated cost (provided by the A/V department) for pre-approval. See section two: Financials for information on how to request a purchase.

- Basic audiovisual equipment includes PC, projector, and lectern microphone already installed in the room.
- Medical Media Services defines normal business hours at 7:00am-7:00pm. If you are in need of audiovisual equipment outside of normal business hours, then your student organization will be responsible for the corresponding fees.

If you have any questions about A/V services and/or equipment please contact Medical Media.

**Medical Media Services**

Email: [av.mms@jefferson.edu](mailto:av.mms@jefferson.edu)

Phone: 215-503-1290

Fax: 215-503-4011

<b>Campus Safety and Security</b>
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Jefferson's Campus Safety and Security Department must be notified in any of the following circumstances:

- If financial transactions will be handled at the event.
- If it is a large scale event with 100 or more attendees.
- If it is an outdoor event on-campus.
- If your event will include non-Jefferson participants (excluding any guest presenters).

This information will be collected on the EMS Web App when a room is requested and automatically sent to the Campus Safety and Security Office. After reviewing the information provided via SMRR, the Campus Safety and Security Department may request additional information and/or determine that a security presence is necessary at the event. The student organization would be responsible for any corresponding charges for the security.

## Catering

If you are planning to have food at your event, you will need to complete the Request to Purchase Form and include your order details on that form. The Office of Student Life and Engagement will then review the Request to Purchase and assign a status (approved, denied, or pending). For Requests to Purchases that are approved, the Office of Student Life and Engagement will place the order and make payment from your account (see "Section Two – Financials" of the Student Organization Manual for additional information on purchasing).

When planning your catering orders, please take note of the following

- **DISCOUNT ITEMS AVAILABLE FOR PURCHASE**  
Paper products are available at a discounted rate through the Office of Student Life and Engagement. Please reference the Purchasing segment in Section Two – Financials of the Manual for additional information.
- **GRATUITY (TIPPING)**  
When placing catering orders for delivery, a standard 10% gratuity will automatically be added to your total by the Office of Student Life and Engagement. This is in addition to any delivery fee charged by the vendor. No gratuity will be added to orders being picked up.

**Please ensure that you do not add additional gratuity to deliveries or add a gratuity for pick up as the additional expense is not approved and will not be covered.** This information is also noted on the Request to Purchase form.

When planning your desired catering order for delivery, please remember to account for this 10% gratuity in your budgeted expense as well as any applicable delivery fees.

- **RIGHT TO MODIFY ORDERS**

Please note that should your purchase total exceed the budgeted amount approved, the Office of Student Life and Engagement reserves the right to modify the order at their discretion to resolve this. Items may be removed or quantities decreased to ensure that the purchase total does not exceed the approved budgeted amount for this expense.

We encourage you to work to get accurate costs from vendors when planning your orders and remember to account for things like delivery fees and gratuity.

### **Option 1: Internal Vendor – Jefferson’s Nutrition and Dietetics Office**

To request catering information from Jefferson’s Nutrition and Dietetics office on the Center City campus, please reach out to the following contact at least two weeks in advance of your event date:

**Shelly Elliott-Williams**

Catering Scheduler, Nutrition & Dietetics

Email: [Shelly.Elliott-Williams@jefferson.edu](mailto:Shelly.Elliott-Williams@jefferson.edu)

Phone: 215-955-8617

**NOTE:** As a reminder, this is only to obtain information about food options and the corresponding costs. Once you have the catering information, complete the Request to Purchase Form with the details. The Office of Student Life and Engagement will approve/deny the purchase request. After receiving approval, the student organization should contact catering to confirm the order and request for an invoice to be emailed to OSLE. After OSLE receives the catering invoice and confirms that the proper funds are available, payment will be sent from your account.

### **Option 2: External – Preferred Vendors**

**When planning to order food from an external vendor, student organizations are expected to utilize the established Preferred Vendors list.** The vendors on that list are those that our office has established Jefferson’s tax-exempt status with, those we are able to use our office purchasing card at or be direct billed, and in many cases offer a special Office of Student Life and Engagement – Student Organizations discount.

The Preferred Vendors list can be found in the Purchasing segment in Section Two – Financials of this Manual. Student organizations are encouraged to review their online menu or contact them directly for additional information on catering options and costs.

**NOTE:** As a reminder, this is only to obtain information about food options and the corresponding costs. Once you have that information, you will complete the Request to Purchase Form with these details and the Office of Student Life and Engagement will assign a status to your request (approved/denied/pending).

## PART C – MARKETING AND PROMOTIONS

### Guidelines and Marketing Options

#### 1. Monday Message

Our weekly Monday Message email publication is an engagement focused communication that contains events for current students and is sent out to those enrolled at our Center City and Dixon campuses. We also sometimes include announcements in the Ongoing section of the email.

NOTE: We do not include membership recruitment / general body meeting announcements for student organizations

To submit an event or announcement for inclusion, please see the guidelines below.

- Send the request to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) with the subject: Request for Monday Message
- Requests must be received no later than Thursday morning for events/announcements that you wish to be included in the upcoming Monday edition
- Events should be submitted in the format of “Event Name (time) – location”
- The sponsoring office or student organization should be included either in the event name or the location section
- For virtual events, the location should be hyperlinked
- Please also include the date of your event when sending your request
- If your event is one hour or less, we only include the start time; for events longer than one hour we include both start and end times
- Announcements should be submitted in the format of “Announcement Title – a few descriptor words if needed – link for more information” – announcements will run for a period of two weeks

- **Please note we are unable to accommodate event descriptions, photos, or attachments (we recommend that when possible, the place that you link to contain the description or other information)**

## **2. Student Organization Announcement and Communications**

Student Organizations can communicate with each other via the Student Organization Link Canvas course. This is a great way to promote your student organization's events and to reach out to other student organizations for potential collaborations.

OSLE has created a thread for Student Organization leaders to communicate with one another within the course.

## **3. Flyers or Posters**

- a. Create your flyer or poster
  - i. Include a valid point of contact (e.g. Jefferson email)
  - ii. Use the Jefferson approved font (Museo Sans)
  - iii. Access templates on the Creative Services webpage at <http://creative.jefferson.edu/templates/>
- b. Send your flyer or poster electronically to [StudentLife@jefferson.edu](mailto:StudentLife@jefferson.edu) for approval
  - i. Upon receipt you will be notified of any necessary changes or given approval to move forward
  - ii. Once you have received the approved posting, you may then start distributing your flyers or posters
    1. Student organizations are strongly encouraged to use electronic flyers instead of paper flyers. When possible, please utilize email and other technology instead of printing out flyers and posting on campus.
    2. If it is necessary to post paper copies on campus, please note that flyers and posters may only be placed in locations designated for that purpose. In compliance with the University Posting Policy (Policy No. 102.38), "Flyers may only be placed on tack strips and bulletin boards. The placing of flyers on walls (including the inside of elevators), windows, glass doors, woodwork, and painted or wallpapered surfaces is prohibited. Posting outside on trees, poles, etc. is subject to Philadelphia Municipal Code 10-1200."



If you would like to request copies from OSLE please reference “Services provided by OSLE outlined in the next section of the manual.

Posting in the Residence Halls is subject to the additional terms below:

Bulletin board space is limited in the residence halls, especially in Barringer and Orlowitz. The bulletin boards are primarily for information regarding Thomas Jefferson University and resident notices. Signs or flyers must be approved and stamped by the Assistant Director of Residence Life in the Department of Housing and Residence Life (DHRL) Office, Orlowitz 103. Please allow 1 week for approval. DHRL reserves the right to deny the posting of material that is not formatted to the specifications outlined in the university Posting Policy (102.38). DHRL also reserves the right to deny the posting of material that is deemed either offensive or inappropriate, as well as the removal of such items from tenants’ doors, windows, other communal areas, or items not approved by DHRL.

#### **Services Provided by OSLE**

As of the publishing date of the Student Organization Manual, the following services were available in our office to our student organizations free of charge. However, please visit the Student Organization Resource Page ([www.jefferson.edu/sos](http://www.jefferson.edu/sos)) for the most up-to-date listing.

#### **Copying**

OSLE can no longer accommodate free copies for student organizations. Please plan your budget accordingly and include estimated printing costs. OSLE will purchase a Staples gift card for large print orders if funds have been approved for your organization.

#### **Use of Art Supplies**

- Markers, crayons, colored pencils
- Stencils
- Glitter
- Scissors
- Glue
- Stamps and ink

- Paper - construction paper, color paper, drawing paper
- Poster boards and trifold – up to three per request
- Paint and brushes

#### **Items Available to Borrow for an Event**

- Individual Dry Erase Boards (8 1/2" x 11", white, black marker attached)
- Clipboards

<b>Promotions</b>
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At times, student organizations may wish to order promotional items such as t-shirts, water bottles, earbuds, bags, binders, pens, etc. There are a number of reasons why student organizations may consider ordering promotional items; we have listed a few potential uses of promotional items below for reference.

- To identify members of the organization or volunteers at an event (e.g. t-shirts and other gear)
- To use as giveaways to get the word out about the organization and help recruit new members (e.g. pens)
- To sell as part of a fundraising effort, either to supplement the monies allocated to the student organization for the academic year or to raise money for charitable causes

As with all purchases, student organizations must have an approved Request to Purchase Form on file in the Office of Student Life and Engagement before proceeding with an order (see “Section Three – Financials” of the Student Organization Manual for additional information on purchasing). Please note the following additional guidelines for ordering promotional materials.

- Promotional items may not contain any profanity or references to alcohol. All content must be in good taste.
- If the promotional item you are ordering will have the Jefferson name or any variation of the Jefferson name on it (including your student organization name), then you must order through the Jefferson Bookstore as trademark approval will be needed. Please contact the Jefferson Bookstore Manager at [travis.harley@jefferson.edu](mailto:travis.harley@jefferson.edu). You will ask the Bookstore to bill the charges to the Office of Student Life and Engagement (Student Organizations) and they will verify with our office that the order has been approved prior to processing.
- If you will not be using the Jefferson name or any variation of the Jefferson name on your promotional item, then you may use an external vendor, pending design approval from OSLE.

- If you will be ordering promotional items for fundraising purposes, it is advised that you take orders from buyers in advance (e.g. for t-shirts, etc.) so that you will only need to place an order for the quantity that you have sold.