

2016-17

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)
- **Student Organizations Link within Blackboard Learn** (<https://jefferson.blackboard.com/>) – log in and then click on the Community Tab, then find it under My Organizations or use the search feature and self-enroll

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 you may have.

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: 215-503-7743

Email: 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 Jefferson email. The Office of Student Life and Engagement 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 posting in the Student Organization Link in Blackboard Learn or including information in the weekly Wednesday Word email newsletter.

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.

Student Organization Minimum Requirements

Part A. Student Organizations must

- Have officers, members, and an advisor meeting the specifications below.
 - A current Jefferson faculty or staff advisor.
 - At least four individuals in the role of officer for the student organization.
 - Officer positions must be filled by current 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 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
 - At least six members in addition to the officers.

- Complete the online Student Organization Registration Form which includes a roster of the organization's officers, members, and advisor and 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 an 80% or higher on each quiz)
- Have a 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 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 31st and the End of Year Report by May 15th (The reports will provide information on the semesterly activity of the student organization [meetings, events, fundraising, etc.] and how the organizational purpose was supported. Student organizations can access the Reports in the "Forms" Section of the Student Organization Link in Blackboard Learn.)

NOTES:

When reviewing student organization registrations for the 2016-17 academic year, a student organization's status will be determined based upon whether they completed the above requirements during the prior academic year.

***This statement was added for the 2016-17 academic year and will be used for determining status beginning with the 2017-18 academic year. Please refer to the corresponding Annual Executive Board Transitions / Changes in Student Organization Leadership segment of this manual for more details.*

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 Leadership Manual
 - Proposals for new organizations will be accepted once a semester
 - The fall semester deadline for proposals is November 1st. Approved proposals will be granted developmental status for the spring semester of that academic year
 - The spring semester deadline for proposals is March 1st. Approved proposals will be granted developmental status for the next 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 who during the academic year fail to adhere to the policies and procedures of the Student Organization Manual.
 - 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. One month after the meeting they must submit an update

- report to the Office of Student Life and Engagement, discussing their progress in implementing the plan of action
- 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 30th; 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 follow the process for starting a new organization

Student Organization Privileges

(PLEASE SEE THE CHART ON THE NEXT PAGE)

Student organizations have the following privileges based upon their status:

Student Organization Privilege	Active Status	Developmental Status	Probationary Status	Inactive Status
Apply for Annual Budget Allocations from the Office of Student Life and Engagement	X	X		
Apply for Special Funding	X	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		
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		

Student Organization Advisors

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.

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.

Responsibilities of the Advisor

- 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.
- 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 potentially have 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 TJU 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 – forceable and non-forceable
- 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.

Advisor Resources

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

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'll likely encounter many opportunities for personal and professional growth, while helping to create and foster this 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.

Timelines

New student organization proposals will be reviewed by the Office of Student Life and Engagement Committee three times a year. Please see the timelines below.

Fall Semester Timeline (for spring developmental status)

- Informational Meeting with the Office of Student Life and Engagement
 - Deadline: October 1st
- Draft Proposal submitted to Office of Student Life and Engagement
 - Deadline: October 15th
- Final Proposal submitted to the Office of Student Life and Engagement
 - Deadline: November 1st

- Office of Student Life and Engagement Committee Meeting (mid-November)
 - Approved proposals will be granted developmental status for the spring semester of that academic year.

Spring Semester Timeline (for fall developmental status)

- Informational Meeting with the Office of Student Life and Engagement
 - Deadline: February 1st
- Draft Proposal submitted to Office of Student Life and Engagement
 - Deadline: February 15th
- Final Proposal submitted to the Office of Student Life and Engagement
 - Deadline: March 1st
- Office of Student Life and Engagement Committee Meeting (mid-March)
 - Approved proposals will be granted developmental status for the fall semester of the next academic year.

Summer Semester Timeline (for fall developmental status)

- Informational Meeting with the Office of Student Life and Engagement
 - Deadline: May 1st
- Draft Proposal submitted to Office of Student Life and Engagement
 - Deadline: May 15th
- Final Proposal submitted to the Office of Student Life and Engagement
 - Deadline: June 1st
- Office of Student Life and Engagement Committee Meeting (mid-June)
 - Approved proposals will be granted developmental status for the fall semester of the next academic year.

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 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**

Please note that as of the 2015-16 academic year, new student organizations may not utilize "Jefferson" or any variation (e.g. "Jeff") as part of their student organization name. Student organizations already in existence prior to the 2015-16 academic year were grandfathered in to the new Jefferson Trademark policy and may continue to use the Jefferson 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’ll state

- Why you think there is a need for this new student organization
- What you would like the organization to accomplish – this can 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. 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. 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.

Article I: Name

Section 1. The name of this organization shall be . . .

Article II: Purpose

Section 1. The purpose of this organization shall be . . .

Article III: Field of Membership

Section 1. Policy of Nondiscrimination

- Thomas Jefferson University is committed to providing equal educational and employment opportunities for all persons, without regard to race, color, national and ethnic origin, religion, sex, sexual orientation, age, disability or veteran’s status.

Section 2. Eligibility Requirements

- Methods of Induction
- Selection Requirements
- Meeting/Activity Participation
- Payment of Dues (if applicable)

Article IV: Officers

Section 1. Office Titles

- President
- Treasurer
- [Other Officer Position]
- [Other Officer Position]
- Advisor

Section 2. Qualifications for each Officer Position

Section 3. Terms of Office

Section 4. Duties of Officers

Section 5. Provisions for Selection/Replacement of Officers

- How & When
- How will power be transferred to new leadership?

Section 6. Provisions for Removal of Officers

Article V: Elections

Section 1. Voting

- Who may vote?
- Rules regarding proxy votes

Article VI: Handling of Funds

Section 1. Application Process

Section 2. Depositing of Funds

Section 3. The Role of the Treasurer

Article VII: Amendments

Section 1. Bylaws may be amended by . . .

Section 2. Provision for advance notice of amendments.

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. *Membership*

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

Section 2. *Eligibility Requirements*

- All students of Thomas Jefferson University are eligible for membership.
- Members must attend one Ob/Gyn Society meeting or sponsored event to be eligible.

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 an enrolled student in one of the Colleges at Thomas Jefferson University.

Section 3. *Terms of Office*

The term for each office shall run for an entire year, starting on May 1 and ending April 30.

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.
- 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, it is recommended that each officer be in charge of running a committee.

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 May 1.
- Those who receive the most 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 $\frac{3}{4}$ vote by the remaining officers.

- If the officer is successfully removed, a special election will be held within two weeks of removal.

Article V. Elections

Section 1. *Voting*

- Only members are eligible to vote.
- As for proxy votes, only those sent through official Jefferson email accounts will be counted.

Article VI. Handling of Funds

Section 1. *Application Process*

Expenses will be refunded to officers and members only with a receipt and the prior approval of the expense by the treasurer.

Section 2. *Depositing of Funds*

The Treasurer together with the President, his/her Vice-President, Secretary and Events Coordinator may be signatories for financial deposits/disbursements in a manner agreed by the entire board.

Section 3. *The Role of the Treasurer*

The Treasurer will have general supervision of the financial affairs of the Ob/Gyn Society and the keeping of these records and any other records required by law. The Treasurer will be responsible for overseeing the collection of membership dues.

The Treasurer will be the custodian of all funds and will ensure that records of income and expenditure of the Ob/Gyn Society are maintained and make disbursements of Society funds as required. He/she will present the accounts of the Society at meetings of the Executive Board.

Article VII: Amendments

Section 1. Bylaws may be amended by the officers only if approved by $\frac{2}{3}$ of the officers.

Section 2. Notifications to Members:

Members will be notified of proposed changes a month in advance and will have that month to voice his/her opposition. If an official challenge is made, the proposed amendment change can only go through with an approval vote of $\frac{3}{5}$ of members.

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
- Advisor Acknowledgement Form

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

- **Priority Deadline: August 15th**

Student organizations who have successfully completed the Student Organization Registration process in full by August 15th 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 August 15th 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 31st**

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

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

Student Organization Annual Registration Process AND Annual Budget Allocation Process

Please refer to the 2016-17 Student Organization Manual for complete information.

Annual Registration Process Opens!

All events and purchases are on hold until the Annual Registration Process and Annual Budget Allocation Process is complete.



Priority Deadline

- Student organizations who have successfully completed the Annual Registration process in full will be eligible for priority room assignments.
- Student organizations who have successfully completed the registration process in full AND have submitted their Annual Budget Allocation Request will be eligible for priority funding.



Standard Deadline

If you missed the Priority Deadline, this is the last date by which the Annual Registration Process and Annual Budget Allocation Process may be completed.



All student organization activity for the 2016-17 academic year may commence.



Annual Registration Process (3 Steps) These need to be done by deadlines

1.  **Complete the Student Organization Registration form**
Any current officer can complete this form (please coordinate to avoid duplicate submissions). You can access the form online at <https://www.surveymonkey.com/r/SORegistration-16-17>

2.  **Complete Student Organization Officer Training**
This needs to be completed by ALL OFFICERS. To access the training, go to the Student Organization Link in the Community section of Blackboard Learn.

3.  **Complete the Advisor Acknowledgement Form**
Your ADVISOR needs to complete this online form at <https://www.surveymonkey.com/r/AdvisorAcknowledgement>

Annual Budget Allocations

Access the Annual Budget Allocation Request Form in the FORMS section of the Student Organization Link in Blackboard Learn.

Refer to the Manual for instructions on how to complete each worksheet tab. Once done, submit the completed form electronically to StudentLife@jefferson.edu and cc-ed to your student organization Advisor.

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

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

Where: <https://www.surveymonkey.com/r/SORegistration-16-17>

Who Should Do This: Any current officer of the student organization for the 2016-17 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 2015-16 Student Organization Directory (which can be accessed by visiting www.jefferson.edu/sos), then please list your desired description for 2016-17 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

If you have more officers than the space provided on the form, please email the information on the additional officers to StudentLife@jefferson.edu.

NOTE: As stated in the Student Organization Minimum Requirements, student organizations must have at least four officers. Officer positions must be filled by current 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, 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 2016-17 Student Organization Advisor on this form has agreed to serve in the capacity of advisor for the period of September 1, 2016 through August 31, 2017 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 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 Blackboard Learn AND your Advisor completes the Advisor Acknowledgement Form.

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

Where: Blackboard Learn “Student Organization Link” (see instructions below)

Who Should Do This: All Officers

In order to ensure delivery of the important information 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 Blackboard Learn which consists of viewing online training modules and taking corresponding quizzes for each.
 - i. Student organization officers must receive a passing score of 80% or higher for each quiz in order to successfully complete the training.
- b. To access the training, please follow the instructions below

Part One (Enroll in the Organization)

1. Open a new web browser window and access Blackboard Learn at <https://jefferson.blackboard.com>
2. Enter your username (campus key) and password in the appropriate boxes.

NOTE: If you do not know your campus key, you should select “Campus Key Lookup” from the Support Links on the left.

3. Once you are logged in, select the “Community” tab at the top of the page.
4. In the Organization Search box on the top left of the screen, type “Student Organization Link” and click Go.
5. In the results section,
 - a. Put your mouse over the Student Organization Link organization and you will see a downward arrow appear.
 - b. Click on the arrow and then click on the link to “Enroll”.
 - c. Then click “Submit” and then “OK”. You should now be able to see the organization.

Part Two (View Presentations and Take Quizzes)

1. There are four components to the training:

- a. Student Organization Manual
 - b. Presentations
 - c. Forms
 - d. Quizzes
2. Utilizing the menu on the left, start by reading the 2016-17 Student Organization Manual, then view each of the Presentations which will highlight some important information from each section of the manual, and lastly review the Forms.
 3. Then click on Quizzes in the menu and take the three quizzes – Operating as a Student Organization, Financials, Event Management – AND complete the Student Organization Officer – Certification Statement.
 - a. You must obtain a score of at least 80 out of 100 points in order to satisfy the Student Organization Officer Training requirement. If your score is less than 80 points, you should watch the presentation again and re-take the quiz.
 4. Once completed, you may log out of Blackboard Learn. You do NOT need to notify the Office of Student Life and Engagement that you have completed the requirement. Your scores will be automatically sent to our office.
 5. The Office of Student Life and Engagement will review your scores and record if you have satisfactorily completed this requirement.

Please note that these trainings will remain available to you throughout the academic year, so anytime you want to reference the information contained in each simply log into Blackboard Learn, click on the Community Tab and access the Student Organization Link.

3. **Complete the Advisor Acknowledgement Form**

Where: <https://www.surveymonkey.com/r/AdvisorAcknowledgement>

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 confirming your student organization status for the academic year and provide you with any additional information needed.

Annual Executive Board Transitions / Change in Student Organization Leadership

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, but it is strongly encouraged that the new officers do not begin their term prior to the end of May. If there is time 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 at the end of May or later, the student organization does not need to notify our office. Instead the student organization will just complete the standard Annual Registration Process in August and that is how our office will know about your new leadership.

Change in Student Organization Leadership

If your student organization experiences a change in leadership after the Annual Registration Process but 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 at:

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

A change in leadership includes the following:

- Executive Board Transitions prior to the end of May
- 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. In instances of Executive Board Transitions or the addition of a student organization officer, the new officer(s) will need to successfully complete the Student Organization Officer Training. Student organization business may be on hold until this is completed.

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. You may access the directory directly by visiting www.jefferson.edu/sos.

In the online Student Organization Directory, student organizations each have a pop-up page consisting of standard content. Should they choose, student organizations may request to customize the webpage 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 by September 15, 2016. 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

Student Organization Email Account

All recognized student organizations are provided with a Jefferson email account to use for student organization business. New student organizations are granted a Jefferson email account upon being given Developmental status.

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.

After a student organization successfully completes the Annual Registration Process has ended, the Office of Student Life and Engagement will email the student organization officers and advisor with the login and password information for the account.

Student organizations are strongly encouraged to utilize their organization's email account when communicating with both internal and external entities. When using the student organization email account, please be sure to sign your full name and your position within the student organization so that the recipient will know with whom they are communicating.

Please note that student organizations are prohibited from using non-Jefferson email accounts (e.g. Gmail, Yahoo, etc.) when conducting student organization business.

Student Organization Email Listserv

Student Organizations can communicate with each other via a special listserv. This is a great way to not only promote your student organization's events, but also to reach out to other student organizations for possible collaborations.

To send a communication, you must use your student organization's Jefferson email account and email the message to studentorganizations@lists.jefferson.edu.

Please note that the listserv is moderated by the Office of Student Life and Engagement. Once the content of a message has been reviewed and approved by the office, it will be posted to the listserv. Messages sent from email addresses other than the student organization's Jefferson email account will not be posted. Usage of the listserv is subject to all applicable Jefferson policies and procedures.

SECTION TWO

FINANCIALS

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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 31st 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 some long term goals and means for accomplishing those. Funds in this account rollover from one academic year to the next.
- Student organizations must have Active 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 available to all active student organizations by request. Please check with the Office of Student Life and Engagement to determine if your student organization has an agency account established.
 - If your student organization does not already have an Agency Account, you must follow the instructions below to establish one.
 - Send an email to StudentLife@jefferson.edu with a cc to your Advisor.
 - Include a statement that your student organization wishes to establish an Agency Account.
 - Include the full names and campus keys of the student organization individuals that you want to have access to the Agency Account.

You will be notified via email once the account has been established and is ready to be used.

Funding Sources

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.

FUNDING SOURCE	DESCRIPTION	ELIGIBILITY
Annual Budget Allocations	Annual Budget Allocations are those funds awarded to a student organization based upon the organization’s budget request submitted in August.	Active and Developmental student organizations
Special Funding	Special Funding is available on a limited basis for student organizations to address their need for funding from either not having an Annual Budget Allocation or for programs and expenses that were not covered in their Annual Budget Allocation. Special Funding is also available for summer programming (June – July).	Active, Developmental, and Probationary student organizations
Agency Account Funds	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
Fundraising	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.	Active and Developmental student organizations
Donations	Student organizations may sometimes receive funding from a professional association that they are affiliated with or a donation from another external source.	Active, Developmental, and Probationary student organizations
Sidney Kimmel Medical College Student Council	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 SCTreasurer@jefferson.edu .	Contact the SKMC Student Council Treasurer for eligibility information.

ANNUAL BUDGET ALLOCATIONS

What is an Annual Budget Allocation?

Annual Budget Allocations come from student activities fees and are essentially an annual operating budget for a student organization. Each August, student organizations will need to 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 1st – May 31st 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 15th**. Student organizations who have successfully completed the Student Organization Registration process in full AND have submitted their Annual Budget Allocation Request by August 15th 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 31st 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 monies 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 to StudentLife@jefferson.edu and cc-ed to your student organization Advisor. No hardcopy submissions will be accepted.
 - 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 will need to 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 is 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 15, 2016)
- 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 iSCORE values of Thomas Jefferson University (Innovation, Service Excellence, Collaboration, Ownership, Respect, and Empowerment).
- 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.

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 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 Annual Budget Allocations?

Funds from Annual Budget Allocations will be available in a Student Organization Operating Account from September 1st – May 31st each academic year. Any funds remaining in a Student Organization Operating Account by May 31st 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 also available for summer programming events (June – July).

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 1st – March 30th. Special Funding requests for the summer (June – July) will be accepted from April 1st – June 30th.

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. 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 to StudentLife@jefferson.edu and cc-ed to your student organization Advisor. No hardcopy submissions will be accepted.
 - 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 iSCORE values of Thomas Jefferson University (Innovation, Service Excellence, Collaboration, Ownership, Respect, and Empowerment)
- 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, 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 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 May 31st each academic year. Any funds remaining in a Student Organization Operating Account by May 31st will automatically revert back 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 1st – July 31st provided the student organization has “Active” 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.

**Prior to engaging in fundraising efforts, the student organization must have set up a Student Organization Agency Account through the Office of Student Life and Engagement. Please see the “Deposits” segment in the Financials Section of this manual for instructions on how to set up the account.*

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.

- 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 is a great fundraising option that requires only a small amount of time and effort on the part of the student organization.

Some suggested local establishments include

- Applebee's
 - Bareburger
 - Barra Rossa
 - Chipotle
 - Dunkin Donuts (Coffee Sale)
 - Eat a Pita
 - Krispy Kreme
 - Top Tomato Pizza Kitchen
 - Wawa (Hoagie Coupons)
- Bake Sales
 - Charging admission or asking for donations at on-campus events run by your student organization
 - Selling of promotional items or other merchandise on campus including but not limited to t-shirts, water bottles, etc.

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 30 days prior to the event/fundraising date AND receive a status of “approved” for the event.
- Student organizations may NOT:

- Collect funds from the sale of alcohol
- Use PayPal, 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 1st – July 31st 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).

**Prior to receiving a donation, the student organization must have set up a Student Organization Agency Account through the Office of Student Life and Engagement. Please see the "Student Organization Accounts" segment in the Financials Section of this manual for information on how to set up an Agency Account.*

Funding Timeline

- No funds will be available during the month of September 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^{st*} – May 31st each academic year.
- Requests for Special Funding and Late Night/Weekend Programming will be accepted from October 1st – March 30th and will be available for use through May 31st each academic year.
- Any funds remaining in a Student Organization Operating Account by May 31st will automatically revert back to the Office of Student Life and Engagement.
- Student organizations wishing to make purchases from June 1st – August 31st will need to submit a Special Funding request through the Office of Student Life and Engagement or 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 1st.*

Student Organization Funding Timeline Chart					
AUGUST	No funds will be available - Student Organization Annual Registration Process / Annual Budget Allocation Requests occur				
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					Summer Special Funding Requests Accepted
MAY					
JUNE					Summer Special Funding monies may be used
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 Operation Account funds. Please check with the Office of Student Life and Engagement.

- Member recruitment activities (including food for meetings, giveaways, etc.)
- 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"> • Appropriation to any partisan, legislative body, political activity, or for the support of the political campaign of any candidate for public office 	X	X
<ul style="list-style-type: none"> • For any event or organization that discriminates on the basis of race, ethnicity, religion, gender, sexual preference, age, ability, or national origin 	X	X
<ul style="list-style-type: none"> • Legal services, including fines and bail bond funds 	X	X
<ul style="list-style-type: none"> • Grants, scholarships, salaries, wages, loans or other personal compensation to any member of the student organization or the advisor 	X	X

<i>Note: This does not preclude reimbursement for approved purchases.</i>		
<ul style="list-style-type: none"> Alcohol and Tobacco <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"> External advertisements (e.g. Philadelphia Inquirer) 	X	X
<ul style="list-style-type: none"> Express or otherwise expedited shipping 	X	X
<ul style="list-style-type: none"> Personal services or personal items including anything purchased specifically for individual members of the student organization 	X	X
<ul style="list-style-type: none"> 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) 	X	X
<ul style="list-style-type: none"> Food for general body meetings of the student organization <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"> Member recruitment activities (including food for meetings, giveaways, etc.) 	X	
<ul style="list-style-type: none"> Gifts or Prizes (e.g. a mug or gift card for a presenter or participant) 	X	
<ul style="list-style-type: none"> Direct donations to religious or charitable organizations 	X	
<ul style="list-style-type: none"> Conferences – including registrations, fees, and travel 	X	
<ul style="list-style-type: none"> Student organization attire (e.g. t-shirts) 	X	
<ul style="list-style-type: none"> Promotional items for the student organization 	X	
<ul style="list-style-type: none"> Other expenses deemed inappropriate by the Office of Student Life and Engagement, the Office of Risk Management, or Thomas Jefferson University 	X	X

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

PART C - PURCHASING

Request to Purchase

All activities for which the student organization use 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 OSLE office, if food this will be the approved room location)

- Contact information for person receiving/picking up 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/RequestToPurchase1617> No hardcopy submissions will be accepted.
- Must be submitted **at least seven business days prior to desired purchase date** or at least 30 days prior if a contract* is involved.
- Must be partnered with an Event Request Form if requested purchases pertain to a student organization event. A completed Event Request Form must be already be on file in the Office of Student Life and Engagement (with the status of “Approved”) or must be submitted with this form. If submitting the Event Request Form with the Request to Purchase, the established timeframe for submitting an Event Request Form (30 days prior to event) will supersede the timeframe listed above. **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 give it 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.

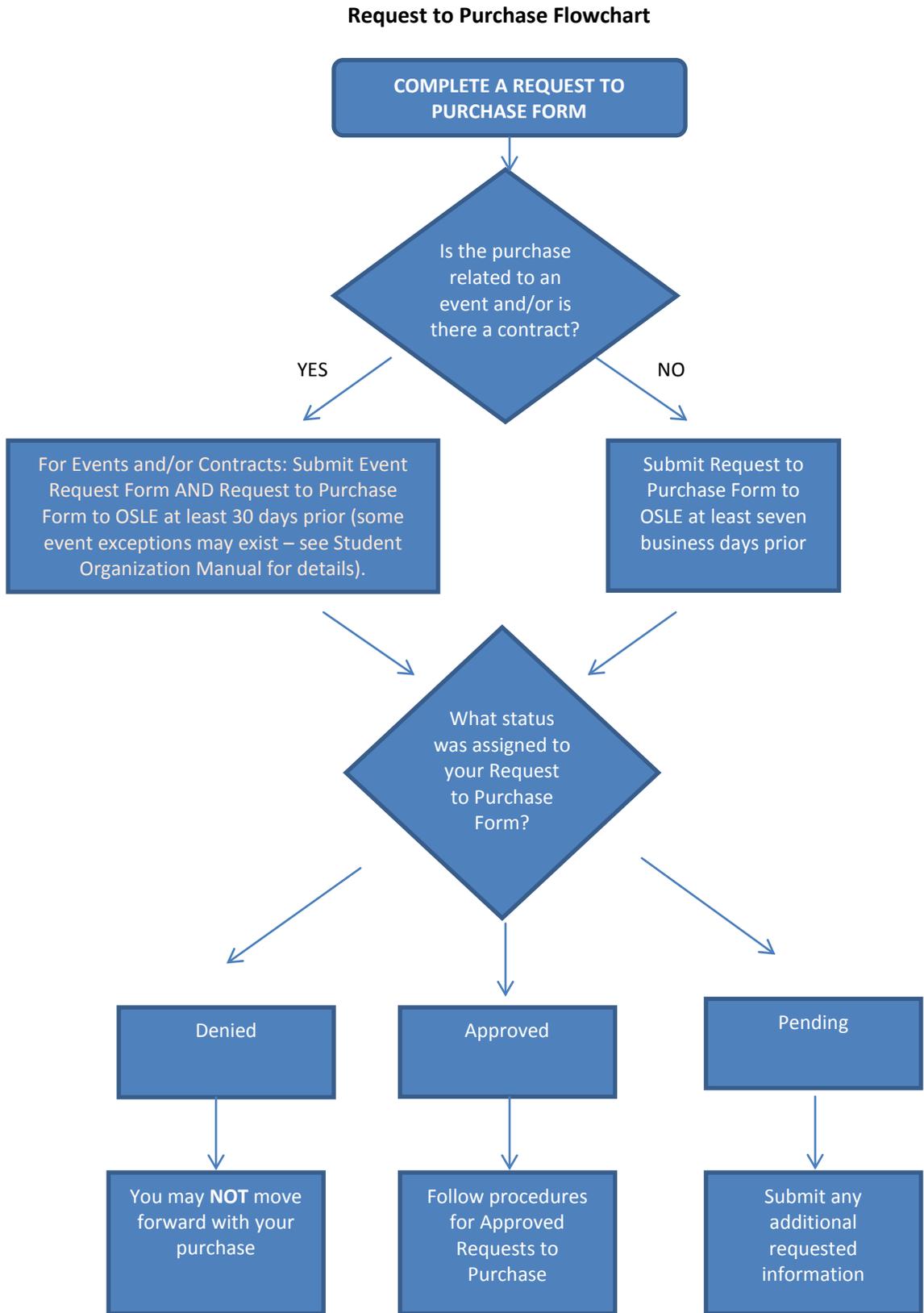
**See “Contracts” segment below.*

Contracts

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 we have put together a Request to Purchase Flowchart to illustrate the process.



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 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 of the event. To reconcile the Request to Purchase Form, a student organization must email StudentLife@jefferson.edu to account for each approved purchase through either attaching a receipt/invoice or through 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.

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. For Catering Services only, OSLE will place the order on your behalf and coordinate payment. 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 make your purchase and coordinate payment via the Purchasing Card. In some instances (most often food delivery) you are required to submit an electronic copy of your receipt to StudentLife@jefferson.edu within 2 business days of the event. Cell phone pictures will suffice.

Option 3: Check Request

At least four weeks prior to the payment due date; submit the following documentation via your Survey Monkey Request to Purchase Form. Please email the contract, invoice, or donation letter to 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 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.

Discount Items Available for Purchase

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 Office of Student Life and Engagement (JAH 105) during normal business hours.

As of the publishing date of the 2016-17 Student Organization Manual, the following items were available for student organizations to purchase from our office. However, please visit the Student Organization Resource Page (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 20% discount from their standard price. Prices listed below already reflect the discount. These items may be ordered in any quantity.

<p>Jefferson El Grande Mug - \$6.25 each (15 oz. cobalt blue ceramic mug with wrap around "Thomas Jefferson University" graphic)</p>	
<p>Jefferson Drinking Glass - \$4.75 each (16 oz. clear glass with blue Jefferson logo)</p>	

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

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)

Preferred Vendors List

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. Should there be a concern that 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.

Internal Vendors

- 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
- Jefferson Bookstore (Follett’s)
Contact: Chris Hoagland
Phone: 215-503-1861
Email: 1409mgr@follett.com
Website: www.jefferson.bkstr.com

External Vendors - Catering

- **Barra Rossa**
Cuisine: Modern Italian
Discounts: 10% off \$100
Location: 929 Walnut St, Philadelphia, PA 19107
Phone: 215-644-9074
Website: www.barrarossa.com
- **Caribou Café**
Cuisine: Parisian Bistro
Discounts: 15% off Jefferson Discount
Location: 1126 Walnut St, Philadelphia, PA 19107
Phone: 215-625-9535
Website: www.cariboucafe.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/>
- **Finn McCool's Ale House**
 Cuisine: Irish, Pub Cuisine
 Discount: 10% off
 Location: 12th & Sansom Streets, Philadelphia, PA
 Phone: 215-923-3090
 Website: www.finnmccoolsphilly.com
- **Fratelli's Italian Bistro**
 Cuisine: Italian
 Discount: Free Delivery on all catering orders
 Location: 1339 Chestnut St, Philadelphia, PA 19107
 Phone: 215-731-0700
 Website: www.fratellisib.com
- **Jake's Sandwich Board**
 Cuisine: Roast Pork, Salads and Sandwiches
 Discount: 15% off catering and free delivery
 Location: 122 S. 12th St. Philadelphia, PA 19107
 Phone: 215-922-0102
www.jakessandwichboard.com
- **Jimmy Johns**
 Cuisine: Sandwiches
 Discounts: 10% off \$100 – Free Delivery
 Location: 221 S. 11th Street, Philadelphia, PA 19107
 Phone: 215-629-4000
 Website: <https://www.jimmyjohns.com/catering/>
- **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
www.masalakitchenphilly.com

- **Matt and Marie's**
 Cuisine: Modern Italian and sandwiches
 Discount: Special Student Catering Menu
 Location: 1107 Walnut St, Philadelphia, PA 19107
 Phone: 267-886-9955
www.mattandmaries.com
- **Miss Rachel's Pantry**
 Cuisine: Vegan, Kosher, Gluten Free options
 Discount: 10% off Catering with Jefferson discount
 Location: 1732 W. Passyunk Avenue, Philadelphia, PA 19145
 Phone: 215-798-0053
<http://www.missrachelspantry.com/catering/>
- **Petit Roti**
 Cuisine: French rotisserie and sandwiches
 Discount: 10% discount
 Location: 248 South 11th, Philadelphia, PA 19107
 Phone: 215-457-5447
 Website: www.petit-roti.com
- **Robek's Fresh Juice and Smoothies**
 Cuisine: Fresh pressed juices, smoothies and bowls
 Discount: 10% discount & free delivery on \$75+
 Location: 1035 Chestnut St, Philadelphia, PA 19107
 Phone: 215-925-5500
 Website: www.robeks.com
- **Saxby's Coffee**
 Cuisine: Coffee, Tea, Pastries
 Location: 234-236 S. 11th St Philadelphia, PA 19107
 Phone: 215-309-3921
www.saxbyscoffee.com
- **Strangelove's**
 Cuisine: Gastropub
 Discount: 10% off and Complimentary use of upstairs room on certain weeknights
 Location: 216 S. 11th St Philadelphia, PA 19107
 Phone: 215-873-0404
www.strangelovesbeerbar.com

- **Sweetgreen**
Cuisine: Fresh, local salads and bowls
Location: 924 Walnut St, Philadelphia, PA 19107
Phone: 215-454-6770
Website: www.sweetgreen.com
- **Top Tomato**
Cuisine: Pizza, Salads, Sandwiches, Pasta
Location: 1107 Walnut Street, Philadelphia, PA 19107
Phone: 215-592-8242
Website: www.toptomatopizzakitchen.com

External Vendors - Supplies

- **Amazon**
Discount: OSLE has recently subscribed to Amazon Prime, making it even easier to get your items quickly. Please be sure to look for Prime eligible items when choosing your order to avoid long shipping and additional fees.
Website: www.amazon.com
- **Office Max**
Website: www.officemax.com
- **Oriental Trading Company**
Website: <http://www.orientaltrading.com/>
- **Staples**
Website: www.staples.com
- **Target**
1128 Chestnut Street, Philadelphia, PA 19107
Phone:
Website: www.target.com
- **Walgreens**
Location: 1101 Locust Street, Philadelphia, PA 19017
Phone: 215-629-5690
Website: <http://www.walgreens.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 and checks 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. When available an electronic donation will be made. 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. Student organizations must have an Agency Account established prior to making a deposit. If your student organization does not already have an Agency Account, you must follow the instructions below to establish one.
 - Send an email to StudentLife@jefferson.edu with a cc to your Advisor.
 - Include a statement that your student organization wishes to establish an Agency Account.

- Include the full names and campus keys of the student organization individuals that you want to have access to the Agency Account.

You will be notified via email once the account has been established and is ready to be used.

- 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 found directly outside the office. The Deposit Envelope must be filled out in its entirety.

**SECTION
THREE
EVENT
MANAGEMENT**

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The EVENT MANAGEMENT GUIDE

This is the order of steps that are needed to put on an event through our office.

1 Event Planning

Time to think about what you want to do

There are a lot of things to consider when planning an event. Here are some ideas to get you thinking:

- What do you want to do and why?
- What is 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 are your catering needs?
- Who is your intended audience?

Make sure to review the "Special Considerations" section of the 2016-17 Student Manual before continuing.

4 Auxiliary Services

A/V, Room Setups, and Security

All of these requests and forms must be submitted no later than one week prior to the event.

Please note that you need a room reservation before you can request any of these services.

A/V requests go directly to Medical Media Services.

Room Set-Up Forms are needed even if the space is to remain empty and go to Custodial Services.

A Campus Safety and Security Notification Form is needed in certain circumstances and goes to Security.

2 Event Request Form

You need this approval every time

Student Organizations must fill this form out for ALL ACTIVITIES that they would like to put on, such as meetings, programs, service activities, etc.

This form needs to be submitted at least 30 days PRIOR to the event and can be accessed at:

<https://surveymokey.com/r/Event-Request-Form>

This form has to be done BEFORE any subsequent steps can be taken.

5 Request to Purchase

For catering, supplies, etc.

For any food or other supplies you want at your event, you will need to complete a Request to Purchase form. This form must be submitted at least seven business days prior to the desired purchase date. The form can be accessed at:

www.surveymonkey.com/r/RequestToPurchase1617

For Requests to Purchase that are approved, OSLE will place the order and make the payment from your account. Please be aware that Personal Reimbursements are no longer a payment option.

3 Room Requests

Make sure to reserve your space far enough in advance

For locations managed by Space Management and Room Reservations (SM&RR), you will need to complete the Room Request Form and email it directly to OSLE at

StudentLife@jefferson.edu

This form has to be submitted at least 14 DAYS in advance.

OSLE will review and forward to SM&RR - doing so indicates that the request is approved on our end, however space assignment is not confirmed until you receive notice from SM&RR.

6 Marketing

How to get the word out on your event.

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

The Wednesday Word Email or OSLE Social Media

Student Organization Listserv

Flyers or Posters

Broadcast Notices / TV
Bulletin Board Monitor System

NOTE: This is just a brief outline for reference. Please refer to the 2016-17 Student Organization Manual for complete and detailed information.

Event Planning

The Event Management section of this Student Organization Manual is designed to help you in planning and implementing 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 achieve 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, Late Night/Weekend Programming Grant, Donations, Charging a fee at 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, 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 building 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) click on Student Resources

- **Building Effective Communities Across Difference**

How to Access: Log into Blackboard Learn, then in the Community Tab access the Student Organization Link, then click on Presentations

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

How to Contact: Phone – 215-955-1031; Location – Sheridan Building, 5th 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 and submit it to StudentLife@jefferson.edu at least 30 days prior to the event date. Please see the Event Request Form segment below for additional details.

Event Request Form

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.

The Event Request Form must be submitted electronically at least 30 days* prior to the event date by visiting: <https://www.surveymonkey.com/r/Event-Request-Form>

**The 30 days prior requirement is waived for standard student organization meetings. The Event Request Form must still be completed and submitted, but the deadline for submission is fourteen days in advance (in line with the Room Requests timeline). If you are requesting a room for your*

standard student organization meeting, please complete and submit the “Room Request Form – Spaces Managed by University Office of the Registrar” with your Event Request 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 – 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 – Social
 - Organizational Meeting
 - 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)
 - Jefferson College of Biomedical Sciences
 - Jefferson College of Health Professions
 - Jefferson College of Nursing
 - Jefferson College of Pharmacy
 - Jefferson College of Population Health
 - Sidney Kimmel Medical College
 - None of the Above (please explain)
- Please indicate whether your event will involve any of the following special circumstances
 - 100 or more Attendees
 - Alcohol
 - 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 – 1st Floor Lobby
- b. College Building – 2nd Floor Lobby
- c. Edison Building – 1st Floor Lobby
- d. Hamilton Building – 2nd Floor Lobby (near elevators)
- e. Jefferson Alumni Hall – 1st Floor Lobby
- f. Residence Halls – Barringer
- g. Residence Halls – Martin
- h. Residence Halls - Orlowitz

After completing the Event Request Form, your submission will be reviewed by the Office of Student Life and Engagement. You will receive notice via your student organization 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 moving forward with your event (this includes marketing, submitting any hospitality and logistics requests such as rooms, catering, a/v, etc.).**

After receiving an approved status for your event, you will then 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, 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, the following must be adhered to

- Student organizations must submit an Event Notification to Jefferson’s Campus Safety and Security Department. Please refer to the Campus Safety and Security segment in the Event Management Section for additional information.

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.

Bake Sales

Due to the potential liability of student organizations from issues that may arise from allergens, food preparation, and food borne illness, only store purchased pre-made items may be used at bake sales. Student organizations may not prepare any food themselves or sell any homemade items.

Balloons

Latex balloons are not permitted on hospital/university premises due to latex allergies. If you are having an event on campus, you may only use Mylar or foil balloons.

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 – 1st Floor Lobby
 - College Building – 2nd Floor Lobby
 - Edison Building – 1st Floor Lobby

- Hamilton Building – 2nd Floor Lobby (near elevators)
- Jefferson Alumni Hall – 1st 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 – 1st Floor Lobby and Jefferson Alumni Hall – 1st 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 (please see the corresponding segment of this Student Organization Manual for additional information). Once your charity drive event request is approved you will come to the Office of Student Life and Engagement to pick up the collection bins.

Film Screenings

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 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.

Release for Use of Images and Statements

Student organizations that take photography, video, or other recordings at their events (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 in Blackboard Learn. 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.

Financial Transactions (sales, donations, etc.)
--

Student organizations must submit an Event Notification to Jefferson’s Campus Safety and Security Department if financial transactions are taking place at the event. 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 consult 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 submit a Campus Safety and Security Notification Form to Jefferson's Campus Safety and Security Department. 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
- Starr Tours – 215-745-7155 – www.starrtours.com
- Yellowbird Bus Company – 215-289-1022 – www.yellowbirdbusco.com

Public Transportation

- Amtrak – 1-800-872-7245 – www.amtrak.com
- New Jersey Transit – 1-800-772-2222 – www.njtransit.com
- PATCO – 856-772-6900 – www.ridepatco.org
- SEPTA – 215-580-7800 – www.septa.org

Taxi Services

- City Cab Company – 215-492-6500
- Millennium Taxi – 215-444-4444
- Olde City Taxi – 215-338-0838
- Penn Cab Co. – 215-438-8888
- United Cab – 215-423-8000
- Uber – Download Uber app from AppStore, Google Play, or Windows Store

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 an Event Notification to Jefferson’s Campus Safety and Security Department. 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 consult 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

Due to the potential liability of student organizations from issues that may arise from allergens, food preparation, and food borne illness, potlucks are not permitted.

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 overseeing 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. 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 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: Rooms 213-219

- Hamilton Building
 - 4th Floor Terrace
 - 1st Floor Lobby*
 - Connelly Auditorium*

**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 1st option when completing the Room Request Form.

- Jefferson Alumni Hall (JAH)
 - 1st Floor Lobby
 - Rooms 207, 307, 407
 - Atrium (formerly the Cafeteria)
 - Eakins Lounge
 - Courtyards
 - Solis-Cohen Auditorium
 - Brent Auditorium
 - Mezzanine open space
 - 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 SM&RR on their behalf. Any student organization found doing so may be placed on probation.

To request a room reservation, please follow these steps:

1. Visit the Room Reservation Management website at <https://emscal.jefferson.edu/virtualems/BrowseForSpace.aspx> to check space availability prior to submitting your request. You may also view image shots of some of the rooms and view their corresponding capacity.
2. A student organization officer must complete the form below in full and submit to the Office of Student Life and Engagement at StudentLife@jefferson.edu **at least 14 DAYS in advance of your event** (for example, if your event is November 15th, you would need to submit the room request form by November 1st).

This is to allow sufficient time for SM&RR to process your request while still meeting the needs of other entities at the University. Additionally, this timeframe has been established to allow enough time for your student organization to submit requests for any additional services once your space has been assigned (e.g. room set-up, audiovisual, catering, etc.). Please note that in order to maintain our ability to process requests in a timely fashion, those requests submitted less than 14 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 being submitted.

Provided there are no issues, the Office of Student Life and Engagement will then send an email to the requestor and SM&RR approving the room request. SM&RR will then review and send a confirmation of space assignment to the requestor within five business days.

IMPORTANT NOTES:

- Room requests for the fall and spring semesters may be submitted to the Office of Student Life and Engagement (StudentLife@jefferson.edu) after the student organization has successfully completed the Annual Registration Process and been assigned their status for the academic year.
 - a. For fall semester room requests, student organizations who have successfully completed the Student Organization Annual Registration process in full by August 15th will be eligible for priority room assignments. Following the August 31st standard deadline for the Annual Registration process, the Office of Student Life and Engagement will process the room requests as they are received.

- b. For spring semester room requests, the Office of Student Life and Engagement will begin to accept requests on December 1st – the date that SM&RR will open spring reservations up to student organizations. This date has been established by SM&RR in accordance with the Space Management/Room Reservation Protocol to allow them to process those requests related to the Core Educational Mission, Mission Related Educational Programming, and other departmental needs. Please note that you may experience longer turnaround times for receiving a confirmation of space assignment from SM&RR during this time.
- 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 requests, those without approval from the Office of Student Life and Engagement, or direct requests to SM&RR will not be processed.
 - Student organizations will be required to contact the appropriate departments to secure additional hospitality and logistics needs (audiovisual, room set-ups, security, catering, etc.). A cost may be incurred for these services and some services may be mandatory (i.e. security). Instructions and contact information for these services can be found in this manual.
 - After receiving your room confirmation, if the time or date of your event needs to be changed, or if your event needs to be cancelled, please forward your original space assignment confirmation to StudentLife@jefferson.edu and state what needs to be changed. Please do not contact SM&RR directly as it may delay processing. Please note that cancellations must be submitted in writing at least 48 hours prior to the event.

ROOM REQUEST FORM – SPACES MANAGED BY ACADEMIC SERVICES (SM&RR)

Student Organization Affiliation:

Entire Jefferson Community All Jefferson Students College Specific (e.g. SKMC only, etc.)

Event Category: Academic Community Service Social

Event Type: Meeting Lecture / Seminar / Panel Tabling Event (information, fundraising, etc.)
 Reception Outdoor Activity Other (please specify):

Student Organization Name:

Student Organization Email:

Reservation # from any existing student organization room reservations from this academic year:

Note: All reservations for a given student organization are managed using a single reservation number/file. By providing this information, you ensure that the new spaces you are requesting will be matched to your existing file.

Name of the Student Organization point person that will be present at the event(s):

Cell Phone # of Student Organization point person:

Event Name:

Note: The event name appears on the Master Calendar, so please be brief but specific)

Event Date(s):

Note: If you are having a recurring event (series) that will occur at the same time, you can list all of those dates.

Exact Event Start Time:	Exact Event End Time:
Desired Set-Up Start Time:	Breakdown Completion Time:
Expected # of Attendees:	
Space Preferences	
1 st Preference:	
2 nd Preference:	
3 rd Preference:	
Requestor's Campus Key:	
Requestor's Name:	
Requestor's Jefferson Email:	
Requestor's Phone:	
Does your event include non-Jefferson participants (excluding any guest presenters)? ___ Yes ___ No <i>IF YES, PLEASE COMPLETE THE INFORMATION BELOW.</i>	
Description of the Event <i>(Include the purpose of the event, type of event, target audience, and who the non-Jefferson participants are [i.e. from another university, guests of students, etc.]):</i>	
Advisor Name:	
Advisor Email:	
<i>Your signature indicates the following</i> <ul style="list-style-type: none"> • <i>That you will be present for the duration of the event and engage in risk management.</i> • <i>That the student organization will be responsible for any related charges, cleaning, service support and/or incidents. Academic Services will bill the Office of Student Life and Engagement who will in turn debit the expenses from the student organization's Operating Account or Agency Account.</i> 	
Advisor Signature:	Date:

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:

Barringer, Orlowitz and Martin Residence Halls contain social lounges for residents in University Housing who wish to hold private gatherings. Students can reserve the lounges by completing and submitting a Lounge Reservation Form online via DHRL's Blackboard page. Only resident students will be able to access the DHRL Blackboard page. Once a reservation is submitted, the Assistant Director of Residence Life will email the student who requested the reservation to confirm. If a prior reservation exists for the date and time of the lounge requested the student will be contacted to reschedule the reservation or discuss other options.

The form contains a section asking if alcohol will be served at the event. If alcohol will be served at an event, an alcohol permit will need to be obtained in advance. Authorization for an alcohol

permit will only be granted following a meeting with the Assistant Director of Residence Life to review the DHRL and TJU alcohol policies. Residents are expected to clean up after their events, which must terminate by 11:00 PM. Exceptions to that time can be made with written permission of the Assistant Director of Housing and Residence Life.

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 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. All fields of the form must be completed. For additional information or questions, please contact Justin Holman at the email above or by calling 215-503-9059.

ROOM REQUEST FORM – SPACES MANAGED BY RECREATION AND FITNESS CENTER	
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. SKMC 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"/> Swimming Pool <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.	
Electronic Signature:	

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://jeffline.jefferson.edu/Services/classroom.html>

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

(<http://jeffline.jefferson.edu/Services/ClassroomReservations/reservation-form.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.

Room Set-Ups

Requests must be submitted no later than one-week prior to your event or services cannot be guaranteed. Per Custodial Services, you must submit a Room Set-Up Form even if no specific set up is needed for an event (e.g. if you have the Atrium reserved and you just want to use the empty space, you must still submit a form to let them know that you want the space to be clear of all tables and chairs – otherwise, they may start to set up in advance for the next upcoming event).

To request a room set-up for your event, please fill out the form below and send to:

Maria Gaynor, Custodial Services

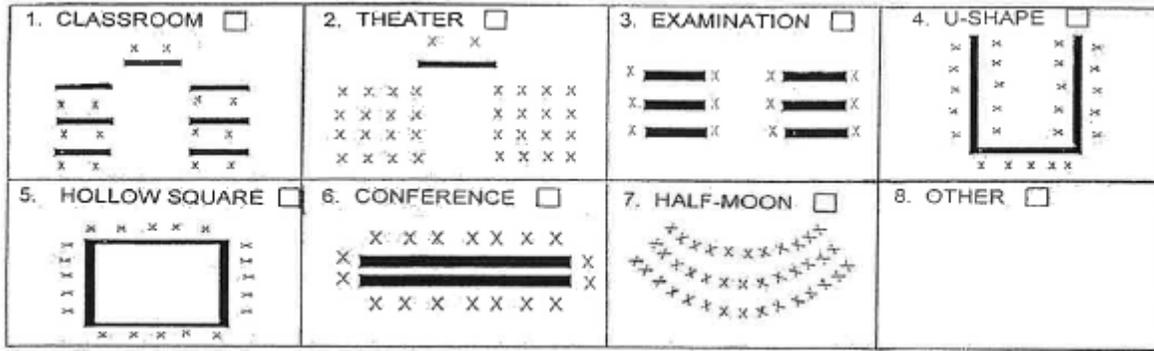
Email: Maria.Gaynor@jefferson.edu

Phone: 215-955-6846

Fax: 215-923-1402

ROOM SET-UP FORM	
Student Organization Name:	
Requestor's Name:	Requestor's Campus Key:
Requestor's Jefferson Email:	Requestor's Phone:
Event Name:	
Location (Building AND Room):	
Event Date:	
Set-Up Start Time:	Break down Time:
Room Set-Up Needs	

Standard Room Set-Up Options



(# of) ____ six-foot rectangular tables
 (desired location in room: _____)

(# of) ____ round tables
 (desired location in room: _____)

(# of) ____ chairs
 (desired location in room: _____)

Additional Comments or Description of Needs:

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

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

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

Maria Gaynor
Office Phone: 215-955-6846
Fax: 215-923-1402
Email: antoinette.ramos@jefferson.edu

All Buildings AFTER 5:00pm

Walter Peeler
Cell Phone: 215-300-1435
Fax: 215-503-4398
Email: walter.peeler@jefferson.edu

Audiovisual Equipment (A/V)

Provided you have an approved Request to Purchase form on file for this event in the Office of Student Life and Engagement, you may move forward with requesting audiovisual equipment for your event (see “Section Three – Financials” of the Student Organization Manual for additional information on purchasing). Requests must be submitted no later than one-week prior to your event or services cannot be guaranteed.

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.

- 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.

To request audiovisual equipment for your event, please fill out the form below and send to:

Medical Media Services

Email: av.mms@jefferson.edu

Phone: 215-503-1290

AUDIOVISUAL EQUIPMENT REQUEST FORM		
Student Organization Name:		
Requestor's Name:	Requestor's Campus Key:	
Requestor's Jefferson Email:	Requestor's Phone:	
Charge Code: <i>Fees Waived for Student Organizations During Normal Business Hours; If request is outside of normal business hours, then bill to the Office of Student Life and Engagement (Student Organizations)</i>		
Event Name:		
Location (Building AND Room):		
Event Date:		
A/V Start Time:	A/V End Time:	
Equipment Requested (please check the corresponding boxes below)		
<u>Data & Video Playback</u> <input type="checkbox"/> Windows PC <input type="checkbox"/> Video Projector (LCD or DLP) <input type="checkbox"/> DVD Player <input type="checkbox"/> VHS VCR <input type="checkbox"/> Television Monitor <input type="checkbox"/> HI-INTENSITY Video Projector	<u>Audio & Sound Reinforcement</u> <input type="checkbox"/> Lectern Microphone <input type="checkbox"/> Table Microphone <input type="checkbox"/> Floor Standing Microphone <input type="checkbox"/> Wireless Lapel Microphone <input type="checkbox"/> Wireless Hand Microphone <input type="checkbox"/> Portable Podium w/ Lectern Mic. <input type="checkbox"/> Small Sound System <input type="checkbox"/> Large Sound System <input type="checkbox"/> Audio Mixing Console	<u>Miscellaneous Equipment</u> <input type="checkbox"/> Laser Pointer <input type="checkbox"/> PowerPoint Remote Control <input type="checkbox"/> Flipchart & Pens <input type="checkbox"/> Tripod Projection Screen <input type="checkbox"/> Overhead Transparency Projector <input type="checkbox"/> CD Player <input type="checkbox"/> Audiocassette Player <input type="checkbox"/> TurningPoint (Audience Response System) Receiver + Keypads QTY: ___ <input type="checkbox"/> 35 MM Slot Projector
Additional Comments or Description of Needs:		

Campus Safety and Security

Student organizations must submit a Campus Safety and Security Notification Form to Jefferson's Campus Safety and Security Department 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).

The Event Notification must be submitted electronically to Katherine.Terzis@jefferson.edu at least seven days in advance of the event. After reviewing the Event Notification, 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.

CAMPUS SAFETY AND SECURITY NOTIFICATION FORM	
Student Organization Name:	
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:	
Event Start Time:	Event End Time:
Event Location:	
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>	

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 those 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, 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

Phone: 215-955-8617

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 place your catering order and make payment 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 place your catering order and make payment from your account.

PART C – MARKETING AND PROMOTIONS

Guidelines and Marketing Options

1. Wednesday Word and/or OSLE Social Media

To have your event featured in the Wednesday Word or on our OSLE social media pages, please provide the following information to StudentLife@jefferson.edu the Monday prior to your desired inclusion date (for example if you want your information included for the September 16th Wednesday Word publication, you would need to submit the information by Monday, September 14th). The information will continue to run until your event date has passed.

Information needed:

- Event name, date, time, location
- Sponsoring Student Organization
- Contact Person (e.g. For more information, please contact _____@jefferson.edu)
- Short description of the event (no more than 5 sentences)

2. Student Organization Listserv

As noted in Section One (“Operating as a Student Organization), student Organizations can communicate with each other via a special listserv. This is a great way to promote your student organization’s events.

To send a communication, you must use your student organization's Jefferson email account and email the message to studentorganizations@lists.jefferson.edu.

Please note that the listserv is moderated by the Office of Student Life and Engagement. Once the content of a message has been reviewed and approved by the office, it will be posted to the listserv. Messages sent from email addresses other than the student organization's Jefferson email account will not be posted. Usage of the listserv is subject to all applicable Jefferson policies and procedures.

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 JeffGraphics webpage at <http://creative.jefferson.edu/templates/>
- b. Sent your flyer or poster electronically to StudentLife@jefferson.edu for approval
 - i. Upon receipt you will be notified of any necessary changes or forwarded the approved posting with watermark seal
 - ii. Once you have received the approved posting, you may then start distributing your flyers or posters
 1. Student organizations are strongly encourage 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."

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.

4. Broadcast Notices / TV Bulletin Board Monitor System

- a. The TV Bulletin Board Monitor System, programmed and designed by Jefferson's Communications Department, is intended to inform the campus of important events, news developments, achievements, strategic initiatives and building-specific classroom/symposium schedules. The current content structure of this system has been developed to mirror/reinforce news that appears on the Intranet home page (Hospital) and the BLACKBOARD LEARN Campus News page (University).
- b. Although not noted separately on the *Campus News* form, TV monitor messages are created from the information submitted via this form at the discretion of the Communications Department. Time-sensitive information should be submitted at least two weeks prior to the event/deadline via the online form which is accessible from the *Campus News* page of BLACKBOARD LEARN. This will allow planning of content and ensure effective overall pre-promotion (via the monitor, Intranet, and if appropriate, *JeffNEWS*).
- c. Please note that this system is NOT maintained by the Office of Student Life and Engagement. It is at the discretion of the managers of the Broadcast Notices / TV Bulletin Board Monitor System whether or not to post content submitted.
- d. To submit information, please follow these steps
 - i. Log into BLACKBOARD LEARN
 - ii. In the TJU Links box, click on "Campus News"
 - iii. Then scroll to the bottom of the page and click on "Submit News for the Intranet, Broadcast Notices and JeffNEWS here"
 - iv. Complete the form as directed

- v. *You may also access the form directly at:*
<http://tjuh.jeffersonhospital.org/intranet/index.cfm?fuseaction=cNews.messageForm>

NOTE: Student Organizations are NOT permitted to have their own websites or social media accounts, including but not limited to Facebook, Twitter, and Instagram.

Services Provided by OSLE

As of the publishing date of the 2016-17 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) for the most up-to-date listing.

Copying

- Black and White Copies
- Color Copies

Use of Art Supplies

- Markers and crayons
- Scissors
- Paper - butcher paper, color paper
- Posterboards

Items Available to Borrow for an Event

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

Promotions

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 Charity Marshall, Bookstore Manager, at 1409mgr@follett.com. You will ask the Bookstore to bill the charges to the Office of Student Life and Engagement (Student Organizations).
- 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.
- 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 you have sold.