

# STUDENT ORGANIZATION GUIDE

This guide is designed to provide helpful information regarding administrative policies and procedures for student organizations.



**2018-2019**



FOR MORE INFO EMAIL  
STUDENTSERVICES@CWSL.EDU

CALIFORNIA WESTERN  
SCHOOL OF LAW | San Diego  
STUDENT & DIVERSITY SERVICES

Revised 9/20/18

# Table of Contents

<b>STUDENT AND DIVERSITY SERVICES .....</b>	<b>4</b>
<b>WELCOME FROM THE STUDENT BAR ASSOCIATION.....</b>	<b>5</b>
SBA Mission Statement .....	6
SBA Executive Board (as of 9/2018) .....	6
SBA Board of Representatives (BOR) .....	7
<b>STUDENT ORGANIZATIONS AT CWSL.....</b>	<b>8</b>
Active Organizations.....	8
Inactive Organizations* .....	8
Creating a New Student Organization.....	9
Reactivating a Student Organization.....	10
<b>STUDENT ORGANIZATION ADMINISTRATION .....</b>	<b>11</b>
General Timeline .....	11
List of Officers.....	12
Officer Roles & Responsibilities .....	12
Governing Documents .....	14
Budgeting Process .....	15
Preliminary Budget Number .....	15
Student Organization Preparation for the Budget Hearing .....	16
Budget Hearing and Allocations .....	16
Student Organization Administrative Logistics .....	16
E-Mail Account .....	16
Webpage .....	17
TWEN .....	17
Student Organization Room.....	17
Lockers.....	17
Cubicle Nameplates .....	18
Mail.....	18
Supplies .....	18
Meeting Facilitation.....	19
Suggested Facilitation Tasks for Effective Meetings.....	19
Decision Making Tools .....	19
Suggested Structure of an Effective Meeting .....	19
BEST PRACTICE TIP: Benefits of Keeping Minutes .....	20
Elections & Transition .....	20
Election Guidelines Example.....	20
Transition of Officers .....	21
Characteristics of an Effective Transition .....	21

Leadership Transition 101 .....	21
<b>STUDENT ORGANIZATION EVENT POLICIES &amp; PROCEDURES .....</b>	<b>22</b>
<b>IMPORTANT POINTS FOR EVERY EVENT:.....</b>	<b>22</b>
<b>WHAT TYPE OF AN EVENT ARE YOU PLANNING? .....</b>	<b>22</b>
Meetings .....	23
Academic Programming.....	23
Speakers/Panel Discussions .....	23
MCLE.....	23
Fundraisers.....	24
Philanthropy (Community Service, Donation Bins) .....	24
Networking/Mixers.....	24
Conference/Symposiums.....	25
Movie Screenings.....	25
<b>EVENT SCHEDULING: Master the CWSL Calendars .....</b>	<b>26</b>
<b>EVENT LOCATION: Where will the event be located?.....</b>	<b>27</b>
On-Campus Room Booking Procedures .....	27
Step by Step Guide to Booking Your Room .....	28
<b>EVENT ADVERTISING: How to Get the Word Out .....</b>	<b>28</b>
<b>STUDENT ORGANIZATION FINANCIAL POLICIES.....</b>	<b>30</b>
How do I pay for event expenses?.....	30
Funding Sources .....	30
SBA & Dues Accounts .....	30
Vendor Check Request Procedure.....	31
Student Organization Advance Request (SOAR).....	32
Procedure for advance .....	32
After the Event - How do I get reimbursed?.....	33
<b>COMMUNITY RELATIONS .....</b>	<b>34</b>
Social Media Guidelines for Student Organizations.....	34
<b>STUDENT &amp; DIVERSITY SERVICES STAFF INFORMATION .....</b>	<b>35</b>
<b>CWSL KEY CONTACTS FOR STUDENT ORGANIZATIONS .....</b>	<b>36</b>
<b>Appendices:</b>	
<b>Appendix A - Constitution Template.....</b>	<b>38</b>
<b>Appendix B - Bylaws Template .....</b>	<b>41</b>
<b>Appendix C - SBA Budget Information Packet.....</b>	<b>45</b>
<b>Appendix D - TWEN: Transferring Admin Privileges .....</b>	<b>55</b>
<b>Appendix E - MCLE Events.....</b>	<b>57</b>
<b>Appendix F - Fundraising Policies and Procedures .....</b>	<b>59</b>
<b>Appendix G - Event Planning Checklist .....</b>	<b>63</b>
<b>Appendix H - Backward Event Timeline Checklist.....</b>	<b>65</b>
<b>Appendix I - Sample Task Assignment List .....</b>	<b>67</b>

<b>Appendix J - Posting of Notices and Announcements .....</b>	<b>69</b>
<b>Appendix K - Social Media Guidelines .....</b>	<b>73</b>
<b>Appendix L - Social Media Best Practices .....</b>	<b>75</b>
<b>Appendix M - Using Images Created by Others .....</b>	<b>76</b>
<b>Appendix N - Student Organization Advance Request Form (SOAR).....</b>	<b>81</b>
<b>Appendix O - SOAR Reporting Form .....</b>	<b>82</b>
<b>Appendix P - Student Organization Reimbursement Form.....</b>	<b>83</b>
<b>Appendix Q - Student Organization Vendor Check Request Form .....</b>	<b>84</b>
<b>Appendix R - Sample of Itemized Receipt.....</b>	<b>85</b>
<b>Appendix S - Missing Receipt Form .....</b>	<b>86</b>
<b>Appendix T - Student Organization Travel Advance Form .....</b>	<b>87</b>
<b>Appendix U - Event Approval Form .....</b>	<b>88</b>



# STUDENT AND DIVERSITY SERVICES

Located in the Student Center on the 1st floor of the 350 Building, **Student and Diversity Services**, serves as your “go-to” resource to assist with the administration of your student organization.

Whether you have a question about how to recruit new members, need ideas for events, access to outside resources, or anything else, we are here to point you in the right direction. We created this guide to give you a comprehensive resource for all the “ins and outs” of student organization management. It covers various aspects from navigating the budgeting process to sponsoring a school-wide event. As a law student with various obligations, we are committed to making this process as clear, efficient and fun as possible for you.

Questions? Stop by the Student Center or reach out to us anytime at [studentservices@cwsu.edu](mailto:studentservices@cwsu.edu).



## Staff Information



**Susan Finster**  
Assistant Dean  
[sfinster@cwsu.edu](mailto:sfinster@cwsu.edu)



**Stacie Patterson**  
Associate Director of  
Diversity and  
Inclusion  
[spatterson@cwsu.edu](mailto:spatterson@cwsu.edu)



**Jessica Placido**  
Program Assistant -  
Student Support  
[jplacido@cwsu.edu](mailto:jplacido@cwsu.edu)



**Riley Davis**  
Program Assistant -  
Student Activities  
[rdavis@cwsu.edu](mailto:rdavis@cwsu.edu)

### **Mission Statement for Student and Diversity Services**

To empower our students and inspire our partners by providing a safe, joyful student experience that supports equality, respect, and excellence.

# WELCOME FROM THE STUDENT BAR ASSOCIATION

To the CWSL Student Leaders of 2018-2019,

Welcome! The Student Bar Association (SBA) looks forward to working with you in this upcoming school year! Student Organizations enrich the overall law school experience by providing extensive professional development, fostering leadership growth, creating networking opportunities, and forming California Western's community and culture.

SBA is consistently available to help any Student Org by coordinating events, bringing new ideas to fruition, and fostering collaboration between different organizations. We look forward to working with you in this upcoming year.

Sincerely,

Edgar Lopez, SBA President  
Joshua Raines, SBA Chairman of the Board

## Leadership



**Edgar Lopez**  
SBA President  
eblopez@law.cwsl.edu



**Joshua Raines**  
SBA Chairman of the  
Board of Representatives  
jdraines@law.cwsl.edu

## **SBA Mission Statement**

The purpose of the Student Bar Association (“SBA”) is to establish and operate a student government that fosters ideals of scholarship, service and ethics. The SBA also promotes the general student welfare and represents the members of the student body in all the matters affecting the school.

The SBA invites all students to get involved by joining one of the committees such as Barrister’s Ball, Student Space Committee, or Community Outreach Committee, by attending an SBA meeting (open to all), or joining an SBA intramural sports team.

Contact the SBA President for more information about becoming involved at [SBAPres@law.cwsl.edu](mailto:SBAPres@law.cwsl.edu).

### **SBA Executive Board (as of 9/2018)**

President	Edgar Lopez
Vice President	Sahar Hassanzada
Treasurer	Sheena Alves
Vice Treasurer	Destiny Orr
Administrator	Julia Wolpert
Webmaster	
Ombudsman	Mark Simpliciano
Director of Activities	Ashley Simpson
Director of Intramurals	Ani Nalbandian
ABA Representative	Nicholas Aliquo
FBA Representative	Irving Partida
FBA Representative	Amanda Thom
SDCBA Representative	Dustin Cantwell
Alumni Representative	John Rankin
Alumni Representative	Tyler Reddy
Public Relations	Stephanie Ramos
Public Relations	Edith Flores
Commentary Co-Editors-in-Chief	Sara Gold Tandis Taghavi

## **SBA Board of Representatives (BOR)**

Chair of BOR	Joshua Raines
Vice Chair of BOR	Daniel Trevino
3L Representative	Parabjheet Dhanda
3L Representative	Daniel Trevino
3L Representative	Catherine Oberholtzer
2L Representative	Lizz Dimaano
2L Representative	Madeline Baker
2L Representative	Rachel Corradini
2L Representative	Leeza Birko
1L Representative - §1	
1L Representative - §2	
1L Representative - §3	
1A Spring Representative	Ryan Stygar

Check us out on [Facebook](#) as well as [www.cwslsba.org](http://www.cwslsba.org)!



# **STUDENT ORGANIZATIONS AT CWSL**

## **Active Organizations**

- American Constitution Society (ACS)
- American Civil Liberties Union (ACLU)
- Asian Pacific American Law Student Association (APALSA)
- Black Law Student Association (BLSA)
- Business Law Society (BLS)
- Children's Advocacy Law Society (CALSA)
- Christian Legal Society (CLS)
- Criminal Law Association (CLA)
- Employment & Labor Law Society (ELLS)
- Entertainment & Sports Law Society (ESLS)
- Environmental Law Society (ELS)
- Federalist Society (FS)
- Health Law Society (HLS)
- Immigration Law Society (IMLS)
- International Law Society (ILS)
- La Raza Law Student Association (LRLSA)
- Middle Eastern Law Student Association (MELSA)
- Military Veterans Legal Society (MVLS)
- Parents in Law Society (PILS)
- Phi Alpha Delta (PAD)
- Pride Law (PRIDE)
- Public Interest Law Foundation (PILF)
- South Asian Law Student Association (SALSA)
- Student Animal Legal Defense Fund (SALDF)
- Student Intellectual Property Law Association (SIPLA)
- Women's Law Caucus (WLC)
- XONR8 (Innocence Project)

## **Inactive Organizations\***

- Amnesty International (AI)
- Child, Family and Elder Law Society (CFELS)
- Hawaii Law Student Association (HLSA)
- Jewish Student Union (JSU)
- Native American Law Student Association (NALSA)
- Tax & Estate Planning Society (TEPS)

\*See page 10 for information on reactivating an inactive organization.

## **Creating a New Student Organization**

Your idea for a new student organization must maintain a legal purpose, fulfill the mission of California Western School of Law and address the needs and desires of the current student body.

### **Procedures**

1. Students interested in creating a new student organization should meet with the Assistant Dean for Student & Diversity Services to discuss and evaluate the proposed organization and learn about the process.

\*If needed, the SBA President has discretion to direct “startup funds” to the proposed student organization to hold a meeting in order to garner interest.

2. If it is determined that there is a need to create the new organization the organization MUST:

- o Submit a **Letter of Intent** to the Assistant Dean for Student & Diversity Services and SBA Board of Representatives.
- o Submit to the **SBA Vice President** the following:
  - Constitution
    - I. Must be typed, with the name of the organization atop the first page. All subsequent pages must be numbered;
    - II. Must begin with a preamble that clearly states the goals and purposes of the organization;
    - III. Must comply with the CWSL policy on Equal Opportunity, the SBA Constitution and SBA Bylaws.

See the Governing Documents Section for detailed information on crafting a constitution and bylaws.

- Bylaws - See Appendix B for ByLaw template
  - Contact Information for Officers
  - Copy of Letter of Intent
  - Faculty Advisor (suggested, not required)
3. The SBA Vice President will send the constitution and bylaws to the SBA President and SBA Chairman of the Board of Representatives (Chair) for review.
    - o The SBA Board of Representatives will vote on the proposed organization.

- After the vote is determined, the Chair will notify the SBA President and Vice President about their decision.
4. The SBA Vice President will submit the constitution and bylaws to the Assistant Dean for Student & Diversity Services of the final approval.
  5. The SBA Vice President will send an approval letter to the student organization with a copy to the Assistant Dean for Student & Diversity Services.
  6. The Student & Diversity Services office will contact the approved organization with information regarding next steps (i.e. email account, locker assignment, cubicle assignment, nameplates, etc.).
    - Please see the Student Organization Administration section of the guide for assistance in getting started.
  7. OPTIONAL: If funds are needed from the SBA, submit to the BOR:
    - Request for Startup Funds Form - Contact [studentservices@cwsl.edu](mailto:studentservices@cwsl.edu) to receive a copy of the form.
    - Please see the Budgeting Process section of the guide to familiarize yourself with the financial processes

---

## **Reactivating a Student Organization**

Reactivating a student organization is a very simple process as governing documents have already been created. Please schedule an appointment with the Assistant Dean of Student and Diversity Services to express your interest in reactivation. Email [studentservices@cwsl.edu](mailto:studentservices@cwsl.edu) or stop by the Student Center on the 1st floor of the 350 Building.

**Student organization leaders play an important role within California Western School of Law. Student organizations create both professional and social opportunities for students and continuously encourage involvement throughout the year. The experience to participate in a student organization is an invaluable experience for a law student.**

# **STUDENT ORGANIZATION ADMINISTRATION**

## **General Timeline**

### **Summer**

#### **May**

- The newly elected SBA Executive Board takes over.
- Student organizations that plan to be active during the summer trimester request funds from the SBA at the summer trimester budget hearing.

#### **August**

- New Student Fall Orientation with Student Leaders
- Planning for fall events
- Student Orgs Room (lower level) Cleanout

### **Fall**

#### **September**

- Participate in Student Org Fair
- The SBA prepares for and holds the fall trimester budget hearing.
- Student organizations that plan to be active during the fall attend the budget hearing and submit an official request for funds via the SBA budget packet
- SBA Elections for 1L representatives
- Leadership Saturday Workshop [mandatory]

#### **October – December**

- Organization events and philanthropy
- Elections (optional, org specific)

### **Spring**

#### **January**

- Spring Orientation with Student Leaders
- The SBA prepares for and holds the spring trimester budget hearing.
- Student organizations that plan to be active during the spring attend the budget hearing and submit an official request for funds via the SBA budget packet

#### **February**

- Organization events and philanthropy (Barrister's Ball, PILF Auction, BLS Conference, ESLS Symposium, etc.)
- Preparation for student organization elections for 2019-2020 Executive Board

#### **March**

- Elections are held (as early as possible)
  - Notify Student and Diversity Services of election results
- Organizations host transition meetings for new boards

## April

- Leadership Transition 101 Workshop
- 

## List of Officers

Student organizations must submit a full list of their elected officers by the end of the first full week of classes EACH TRIMESTER to [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu). Because the Assistant Dean for Student & Diversity Services oversees and approves expenditures from the SBA accounts, it is crucial that the office has an updated list of the officers authorized to commit the organization's funds.

Please note that failure to submit contact information may result in:

- Inability to receive SBA funding during the trimester
  - Reduction in funds awarded by the Board of Representatives
  - Delay in communications regarding scholarships and other opportunities for the organization.
  - Missing important information from administration or other student leaders.
- 

## Officer Roles & Responsibilities

To ensure the efficacy of a student organization and make sure its established mission is fulfilled, it is important to have a clear understanding of each executive board member's role and responsibilities. The future of the organization's success is dependent on sound, ethical governance and financial management.

Accountability and clarity in these roles is essential to a rewarding experience as a leader in your organization. These roles should be outlined specifically in the organization's constitution and/or bylaws. Note that these roles **SHOULD BE TAILORED TO EACH ORG'S NEEDS**. To get you started, below is a list of the universally recognized officers and each's responsibilities.

### **President** [*modify as needed*]

- Presides over meetings of the organization
- Calls special meetings of the organization
- Facilitates executive board meetings
- Delegates organizational tasks to board members
- Appoints committee chairs
- Maintains contact with organization's Faculty Advisor & CWSL Administration
- Maintains contact with (inter)national organization and/or affinity bar association in the community
- Represents the organization to the CWSL Administration
- Serves as a spokesperson for the organization
- Serves as a signatory on financial accounts
- Assists all executive officers
- Provides follow-up to organizational tasks
- Organizes executive board retreats
- Coordinates executive board officer transitions
- Represents organization at official functions



- Remains fair and impartial during organization decision making processes
- Provides encouragement and motivation to fellow officers and organization members

### **Vice President** *[modify as needed]*

- Assumes the duties of the President in his or her absence
- Serves as an ex-officio member of standing committees
- Directs updates and revisions to governance documents
- Facilitates election of officers
- Recruits new members
- Serves as Parliamentarian
- Organizes and coordinates the planning of events
- Represents organization at official functions
- Remains fair and impartial during organizational decision making processes
- Performs other duties as directed by the President

### **Secretary** *[modify as needed]*

- Keeps a record of all members of the organization and notifies Student & Diversity Services of Executive Board Member changes
- Keeps a record of all activities of the organization
- Prepares organization's calendar of events
- Submits event approval requests to Student & Diversity Services when applicable
- Prepares agendas with the President for all general meetings & executive board meetings
- Notifies all members of meetings and distributes agenda to organization's members in advance of meetings
- Keeps the organization informed of both organizational and law school business
- Keeps and distributes minutes of each meeting of the organization
- Creates sign-in sheets and maintains attendance at all meetings
- Maintains organizational records in hard copy or digital format
- Prepares and files any report required
- Handles all official correspondence of the organization
- Collects organization mail from the Org Mailbox in the Student Org Lounge
- Remains fair and impartial during organization decision making process
- Performs other duties as directed by the President

### **Treasurer** *[modify as needed]*

- Is familiar with CWSL Business Office procedures and policies as outlined in this Student Organization Guide
- Serves as the primary signatory on financial accounts
- Serves as chair of the finance committee
- Pays organization's bills
- Collects organization dues (if applicable)
- Keeps all financial records of the organization
- Attends SBA Budget Hearing
- Prepares budget and submits all budget requests to the SBA for funds
- Prepares and submits financial reports to the members
- Advises members on financial matters (i.e. vendor payment, reimbursement rules, ticket selling procedures, etc.)
- Coordinates fundraising drives
- Performs other duties as directed by the President

## **Other Possible Officer Positions** *[expand or modify, as needed]*

- Activities Director
- Alumni Relations Chairperson
- Community Liaison
- Community Service Director
- Events Chairperson
- Marketing Coordinator
- Newsletter Editor
- Parliamentarian
- Philanthropy Chairperson
- Program Coordinator
- Public Relations Coordinator
- Recruitment & Retention Director
- Social Chairperson

Be creative! Just make sure to update the governing documents when any additional positions are created.

---

## **Governing Documents**

An organization's constitution and bylaws govern the operation of your student organization and provide guidelines for all aspects of its activity. These documents are ESSENTIAL as they state the **rights and responsibilities** of the members, officers, and committees, which comprise your organization. Often there is confusion over the definitions of the terms "constitution" and "bylaws". There are important differences between the two that should be recognized and understood.

The **constitution** contains the **fundamental principles** of an organization and determines the **responsibilities and rights** of its **officers and members**.

### **Why are student organizations required to have a Constitution?**

- Clarifies the purpose of the organization and outlines the basic structure of the organization
- Provides the cornerstone for building an effective organization/group
- Allows members, potential members and the CWSL community to have a better understanding of what the organization is all about and how it functions
- Clearly articulates election process
- Clearly articulates procedure for removal of officers
- Defines voting membership and officers (ex. Limits to currently enrolled students)
- Codifies a procedure for amendments
- References bylaws and other relevant documents that will govern the group's activities or functioning

Please see Appendix A for a Constitution template

The **bylaws** delineate the **detailed procedures** and **working guidelines** of the organization and determine the **routine operations** of the organization.

### **Why should a student organization have Bylaws?**

- Bylaws are the written rules that control the internal affairs of an organization
- Bylaws are essentially an expansion of the articles or sections of the constitution
- They describe in detail the procedures and steps the organization must follow in order to conduct business effectively and efficiently
- Thoroughly written bylaws create procedures so organizations can manage new situations or issues that may arise
- Bylaws can save time trying to work out organizational complications, help define your mission or goals, and keep things running smoothly
- Bylaws govern how board members manage the organization's operations

Both the **constitution and bylaws are divided into parts, called **articles****. As necessary, the articles can then further be divided into sections and subsections. In summary, the constitution covers the fundamental principles your student organization but does not provide specific procedures for operating your organization. Bylaws set forth in detail the procedures your group must follow to conduct business in an orderly manner. They provide further definition to the provisions contained in the constitution and can be changed more easily as the needs of the organization change. It will serve your organization well to ensure that your governing documents are crafted carefully and remain current.

**Please see Appendix B for a Bylaws template**

## **Budgeting Process**

**Each trimester** the SBA Board of Representatives (BOR) is given a budget amount from the CWSL Business Office that is to be allocated between the SBA and the active student organizations. The budget allocation is determined by the number of students enrolled.

Each trimester (Summer, Spring & Fall) the following process occurs:

### **Preliminary Budget Number**

Two weeks after classes start for continuing students, the CWSL Business Office calculates the **budget number** based on the amount of currently enrolled students, and notifies the Assistant Dean for Student and Diversity Services ("SDS"), the SBA President, the SBA Treasurer and the Chair of the Board of Representatives ("BOR").

**This preliminary number is to be used by the SBA when conducting their budget review hearing.**

## **Student Organization Preparation for the Budget Hearing**

The SBA schedules a **Budget Information Session** during the beginning of each trimester at which all of the following information is presented in detail. Each organization that wishes to receive funds must attend and receive the **Budget Information Packet**.

This packet includes:

- Budget Allocation Request Form
- Philanthropic Memorandum Form
- Student Organization/SBA Contract
- Student Organization Information & Acknowledgement Form

***Please see Appendix C for an exemplar of the Budget Information Packet.***

## **Budget Hearing and Allocations**

Each trimester the BOR holds a **budget hearing** to allocate funds to the SBA and each active student organization.

1. After the SBA budget hearing, a **proposed budget spreadsheet** is submitted by the Chair of the BOR to the Assistant Dean of S&DS for approval. The approval process takes approximately **48 hours**.
2. Once approved, the budget spreadsheet is emailed to the Business Office where **account numbers** are assigned. Turnaround time for business office processing approximately **36 hours**.
3. Upon receipt of the **approved budget from the CWSL Business Office**, the SBA then informs each student organization of its allocations.
4. **Please note:** the following SBA administrative expenses will need to be included in the SBA budget *each trimester*.
  - Cox Communication

---

## **Student Organization Administrative Logistics**

### **E-Mail Account**

Each student organization has an official **CWSL e-mail address account**. This is the e-mail account disseminated to the public and others who might be interested in your organization. **Remember to check this email often!!!** Please stop by the Student Center to obtain your organization's email and password. Passwords cannot be provided via email.

- i. **Security**  
CWSL has a security setting on the student email system that limits any account from sending more than 100 email messages in an

hour. If an account tries to send more than 100 in an hour, the email account is disabled. If your organization needs to have this limit raised, please contact [dstarnes@cwsl.edu](mailto:dstarnes@cwsl.edu) for an adjustment.

If you receive the following message: *“Your mailbox is almost full, click here and enter your username and password to get more mailbox space”*, DO NOT respond as this is a phishing message.

## ii. Passwords

Passwords are changed at the end of each Summer Trimester. Student & Diversity Services will distribute the updated passwords to current, authorized student organization board members.

If you misplace or forget your password, please stop by the Student Center.

## Webpage

The SBA provides a website for all student organizations at <http://cwslsba.org/>. Please use your webpage to list the mission of the organization, current board members as well as to announce meetings and events in more detail.

Webpage updates are implemented by the current **SBA Webmaster**.

## TWEN

Each student organization is strongly encouraged to have its own [TWEN page](#). This is used to correspond with members, store digital files, maintain a record of all student organization administration and planning efforts, and add events to the calendar.

Please contact Program Assistant, Riley Davis at [rdavis@cwsl.edu](mailto:rdavis@cwsl.edu) regarding setting up a TWEN page or gaining access to an existing page as a new Administrator (Appendix D).

## Student Organization Room

The Student Organization Room is located in the 350 Building on the Lower Level. Lockers, cubicles and mailboxes for student organization are located here. Locker and cubicle space for student organizations is a privilege, not a right. Please be considerate of the organizations and individuals with whom you are sharing space.

Please contact [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu) to find out the locker and/or cubicle number for your organization or to request one.

NOTE: During final examinations the lounge is used by Faculty Support for testing. An email notice will go out with instructions to clean out your cubicle and locker area. **This is a mandatory cleanout.**

## Lockers

The President and Vice President of each organization may be issued locker keys. To obtain a key:



1. Pay the \$10.00 deposit in the Business Office (you will receive a receipt).
2. Take the receipt to the security desk in the 350 Building lobby.
3. Keys must be returned to Security at the end of the President/Vice President's term.

SAFETY NOTE: Items should never be stored on top of the lockers as they are a safety hazard. Any items placed on top of the locker will be removed and discarded by facilities at any time without notice.

### **Cubicle Nameplates**

To obtain a cubicle name plate, send your request to [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu). The cost for a name plate averages \$16.00. Your student organization will be invoiced when the name plate arrives.

Please fill out a [Student Organization Vendor Check Request Form](#) (Appendix Q) and submit (with invoice) to the SBA Treasurer.

### **Mail**

The school's administrative address (225 Cedar Street, San Diego, CA 92101) may only be used for student organization mail. [Personal student mail is not permitted at California Western](#). Please ensure that mail is addressed to the name of the student organization.

The SBA Administrator will pick up student organization mail on a weekly basis and distribute to the student organization mailbox which is located in the Student Organization Room.

Student organizations may mail letters and packages at the main reception desk located at:

*225 Administration Building, First Floor  
Monday - Friday  
8:00 a.m. to 5:00 p.m.*

Please have cash for the postage.

### **Supplies**

Student organizations are responsible for ordering their own supplies and should have a budget already set aside for any supplies it may need.

---

## **Meeting Facilitation**

As a leader you will be expected to guide your group's meetings. Facilitation is process to aid the running of successful meetings in organizations. By using facilitation tools, groups function more efficiently while making sure everyone is involved in discussions and making decisions.

Good facilitators stay neutral, earning the trust of everyone at the meeting.

### **Suggested Facilitation Tools for Effective Meetings**

- Help the group plan the meeting's agenda
  - TIP: Share proposed agenda and call for additions from key stakeholders
  - TIP: Consider timing and order of agenda items
- Prepare the room layout for the meeting in a manner that encourages everyone to participate
  - TIP: Have materials ready and organized in advance
- Provide an overview of the meeting topics and explain how the decision making process works (voting, consensus, etc.)
- Keep the meeting on track by:
  - Being aware of time constraints
  - Following the agenda
  - Addressing one item at a time
  - Encouraging everyone to participate

### **Decision Making Tools**

**Robert's Rules of Order** is the standard for facilitating discussions and group decision-making. Having an agreed upon set of rules makes meetings run more smoothly and effectively. Your organization has the liberty to modify these rules or find another suitable process altogether. What is most important is that there is an outlined process that encourages fairness and participation.

***Please visit [robertsrules.org](http://robertsrules.org) for an overview.***

### **Suggested Structure of an Effective Meeting**

It is important to define the purpose of the meeting your organization intends to hold. We encourage you to make sure the purpose is clearly communicated. Careful planning is the key to holding a productive and engaging meeting. Otherwise, the meeting may be viewed as boring and unproductive. Lackluster and misguided meetings will not help you to grow your organization or accomplish goals. The following steps are some suggested guidelines:

- Agenda
- Sign-in Sheet
- Call meeting to order
- Approve minutes
- Committee Reports
- Old Business
- New Business
- Open Floor
- Adjourn

Please modify this process as your organization's leadership sees fit. Ensure that whatever process is decided upon is documented in the organization's bylaws.

### **BEST PRACTICE TIP: Benefits of Keeping Minutes**

- Designate an officer, usually the secretary or his or her designee to record the main points of discussion during the meeting
- Provides official record of what items were discussed and decisions were made
- Members who cannot attend meetings are able to receive pertinent information when the minutes are consistently kept and distributed
- Assists with follow up on organization action items and committee assignments
- Helps formulate agenda for the next meeting
- Posting minutes for members review increases participation and improves communication

## **Elections & Transition**

Your organization's election guidelines should be clearly outlined in the organization's governing documents. In order to avoid confusion or conflict, make sure to either create or review guidelines that are agreed upon by the organization and then document accordingly. The administration of elections will vary from organization to organization, but each should be planned carefully. It is important that the process is objective and communicated clearly to all members.

### **Election Guidelines Example**

#### **ARTICLE VI**

#### **ELECTION OF OFFICERS**

- |                  |  |
|------------------|--|
| <b>Section 1</b> | Elections shall be held before the culmination of the current academic year, traditionally in the spring trimester. Elections will be scheduled at the discretion of the President and Vice President within the spring trimester. However, spring elections must end no later than three weeks prior to the beginning of spring finals as a courtesy to those running for office.   |
| <b>Section 2</b> | The Executive Board has authority to establish additional rules regarding a particular election prior to the announcement of candidates for that election. Such rules must be communicated to all members at least one week prior to nomination deadline.  |
| <b>Section 3</b> | Nominations for officers shall be made at the regular meeting immediately preceding the election. Nominations may also be made from the floor immediately prior to the election for each office. Members may nominate themselves for an office. All candidates for office must be students in good standing and have a cumulative GPA of 2.25 or higher. Any student subject to disciplinary action, academic probation may be deemed ineligible for nomination. |
| <b>Section 4</b> | All candidates running for contested positions shall be permitted to give a speech at the beginning of the election meeting, prior to the vote. Votes may only be cast by dues paying members. Voting will be by secret ballot; Officers shall be elected by majority vote. However, when there is only one candidate for an office, a motion may be made to elect the candidate by acclamation.   |

- Section 5** If the position of President becomes vacant as the result of resignation, ineligibility or recall, the Vice President shall assume the office of President. Vacancies in any other elected office shall be filled by an election held at the next regular meeting where the vacancy was announced. Nominations may be made at the meeting where the vacancy is announced, and nominations may also be made from the floor at the time of the election. The President may appoint an interim officer to fill the vacancy until the election is held.
- Section 6** The Terms of Office will commence on the first day of the summer trimester and continue up to the first day of the following summer's trimester.
- Section 7** Any member of the board may be removed from office by a majority vote of the active membership. Removal of any officer must be by secret ballot.

Please note that this is only an example and that your organization may modify the guidelines to meet its unique needs. **All organizations should complete elections at least three weeks, if not more, before the end of classes.**

## **Transition of Officers**

An officer transition is a period of time between the selection of new officers (elections and/or appointments) and the point at which new officers assume their new role within the organization. Many benefits accompany a successful officer transition. Transitions provide an opportunity to pass on knowledge and wisdom to future leaders. This is also a time to assess and review previous programs, events, areas of organizational strengths and challenges.

## **Characteristics of an Effective Transition**

- Maintains effective continuity of the group's progress, goals and growth.
- Helps ensure the successful transfer of important information. (e.g. logins & passwords, key contacts, governing documents)
- Helps build upon the achievements of the outgoing executive board
- Reinforces positive and productive communication
- Provides an opportunity for incoming officers to plan for the future and establish new goals.
- Creates an atmosphere where officers learn to work together effectively.

In order to help the incoming officers perform their leadership duties, it is strongly suggested that each outgoing officer create an **end of term memo**. This can include information regarding administrative procedures, community contacts the organization may be affiliated with and important lessons learned. Whenever possible, introductions of new board members to key contacts should be facilitated by outgoing members. New student leaders should also become very familiar with their organization's constitution and by-laws.

## **Leadership Transition 101**

At the end of the academic year, Student and Diversity Services hosts a Leadership Transition workshop what will give all organizations' outgoing and incoming board members the opportunity to learn best practices.

# **STUDENT ORGANIZATION EVENT POLICIES & PROCEDURES**

Student Organization events play a critical role in enriching the law school experience. Student Organization events should relate to the mission of California Western School of Law.

Once your organization decides to host an event, there are key event planning decisions to be made, such as:

- What type of event is it?
- Where will the event be held? (at CWSL or off-campus?)
- When will the event be held? (Certain events require at least 6 months planning).
- Who is your target audience?
- How to publicize your event?
- How to pay for your event?

## **IMPORTANT POINTS FOR EVERY EVENT:**

1. Every event booking starts with the [Student Organization Event Approval Form](#) - see appendix U for Event Approval Form.
2. Start planning weeks in advance and use a timeline!
  - i. See Appendix G for an “Event Planning Checklist”
  - ii. See Appendix H for a “Backwards Event Timeline”
  - iii. See Appendix I for a “Sample Task Assignment List”
3. Familiarize yourself with the CWSL [Room Booking Policy](#). It covers all the nuances of running an event here on campus. It can be found at: [http://info.cwsl.edu/onlineinfo/facilities/components/default.asp?nav=home.asp&body=room\\_booking/home.asp](http://info.cwsl.edu/onlineinfo/facilities/components/default.asp?nav=home.asp&body=room_booking/home.asp)
4. Consider using a Student Organization Advance Request to get funds for your event in advance rather than spending money up front by planning your event a few weeks ahead of time.
5. Keep good records.
  - Keep track of all aspects of event planning AND keep track of all receipts so you can be reimbursed.

## **WHAT TYPE OF AN EVENT ARE YOU PLANNING?**

Every year CWSL student organizations plan many types of events. Most events are on-campus, such as meetings, speakers/panel discussions, fundraising (bake sales), philanthropy/community service, networking and movie screenings. Off-campus events are usually networking/mixers, community service and fundraisers.

Key information to help plan an event is summarized as follows:



## **Meetings**

Student organizations must follow their individual charters regarding meetings, however it is suggested that every meeting should include the following:

- Agenda
- Minutes
- Action Items

Student organizations can forward each General Meeting's agenda to the SBA in order to have them posted on the SBA website and available on hard copy in the SBA Student Organization binder (located in the SBA cubicle). If interested, please contact [SBAadmin@law.cwsl.edu](mailto:SBAadmin@law.cwsl.edu).

The SBA requests the minutes from General Meetings throughout the semester. These will not be posted online but are requested as a matter of record. Please forward materials to SBA Administrator at [SBAadmin@law.cwsl.edu](mailto:SBAadmin@law.cwsl.edu).

## **Academic Programming**

Student organizations may host academic support programming such as multiple choice skills, essay writing skills, outlining, time management, flashcard creation, or other academic skills. Prior to event approval, student organizations must receive approval for the academic program by Academic Achievement.

Please submit your draft program to Dean Kiyana Kiel at [kkiel@cwsl.edu](mailto:kkiel@cwsl.edu). Please note that such programs may also qualify for limited budgetary assistance from Academic Achievement.

## **Speakers/Panel Discussions**

No more than two (2) student organization-sponsored speakers will be allowed on a given date.

### Resources:

- A). Speakers  
The Career and Professional Development Office is a resource for finding speakers. Please contact them at [cpdo@cwsl.edu](mailto:cpdo@cwsl.edu).
- B). Thank You Gifts
  - Gift cards are **not** allowed.
  - Gifts will be charged to the organization. Please make sure to budget for these items.
  - Signature gifts may take up to 30 days to arrive, so please plan accordingly.
  - Honorariums
    - Maximum allowed is \$100.00 (no gift cards)
    - Not allowed for CWSL Faculty or Staff

## **MCLE**

If you are interested in providing Mandatory Continuing Legal Education (MCLE) credits, please contact Debra Compton ([dcompton@cwsl.edu](mailto:dcompton@cwsl.edu)) at least one month prior to your event. See Appendix E for procedures.

## **Fundraisers**

Student organizations may raise money for dues accounts and/or charitable donations. All fundraising activities must be approved by the Assistant Dean for Student & Diversity Services. All California Western policies apply to student organization fundraising events and activities (e.g. room booking, Business Office, etc.).

- Charitable Donations  
Fundraisers for a charitable donation (i.e. auctions) must be approved by the Assistant Dean for Student & Diversity Services and the Development Department at least **three (3) months** in advance of the fundraiser. Requests submitted less than three (3) months in advance may not be approved. Please see Appendix F for policy and procedures.
  - Student organizations are encouraged to meet with the Development Department once the event is approved to discuss fundraising strategies, materials and beneficiary.
- Dues Account  
Fundraisers for a student organization's dues account (i.e. food sales) must be approved by the Assistant Dean for Student & Diversity Services. No more than two (2) food sales are permitted per week, and they cannot be held on the same day. Please see Appendix F, section 4.2 for policy and procedures.

## **Philanthropy (Community Service, Donation Bins)**

The SBA strongly recommends each student organization to perform a minimum of one philanthropic activity per trimester (summer trimesters are exempted *if* the organization is not active during the summer trimester). The SBA may coordinate philanthropic events for student organizations to choose from to satisfy the requirement or student organizations may choose to do their own philanthropy.

- To reserve a donation bin, complete an Event Approval Form with the name of the philanthropy, dates for the bins, etc.. Bins are reserved through the Room Booking process.

## **Networking/Mixers**

Building relationships among other students, alumni and legal professionals is a key skill for a rewarding legal career and an opportunity to balance out the rigors of studying for most students.

CWSL's alcohol policy applies to ALL on-campus events (see CWSL [Room Booking Policy](#)). If the networking/mixer is on-campus then the event host **must** hire a company for bartending services with a valid permit to serve alcohol at the event. A copy of the company's vendor license and insurance policy must be submitted to the Student & Diversity Services office with the Event Approval Form.

At all networking/mixer events with alcohol, event hosts are encouraged to prevent intoxication by:

- Providing for a sufficient amount of alternative, non-alcoholic beverages;
- Providing a sufficient amount of substantial, wholesome food; and
- No self-service of alcohol.
- Event hosts are legally responsible to insure CWSL policies and all applicable laws are complied with.

Further, student organizational funds shall not be used for the purchase of alcohol at student organization events, except Barrister's Ball. Individual members may purchase alcohol for personal consumption at off-campus events, but students will NOT be reimbursed for any alcohol purchased at an approved event from student organizational funds (SBA budgeted or dues account).

## **Conference/Symposiums**

CWSL has a strong tradition of hosting student organized conferences such as the Business Law Conference and Entertainment & Sports Law Symposium. Successful conferences and symposiums require at least 9 months to plan and must be held during times when other major campus-wide events are not being held.

- If a student organization is hosting an event on campus and wishes to charge admission, CWSL is required to also charge the student organization a room rental fee at its standard rate.

In addition, you cannot require a "contribution" to attend a student event held on campus to avoid this policy. (See CWSL [Room Booking Policy](#)).

While in the event planning stage, student organizations should consult with Student & Diversity Services, Career & Professional Development Office, Alumni Engagement and Marketing & Communications.

## **Movie Screenings**

All events at CWSL must comply with the law school's institutional mission. Before deciding on your movie, review the *Compatibility with Institutional Mission* section of the CWSL [Room Booking Policy](#)).

Due to copyright laws, student organizations interested in showing a film must have written permission from a licensing agent, unless the film is already in the public domain. Don't forget to fill out a room booking request form as well as an email to Audio Visual ([EdTech@cwsl.edu](mailto:EdTech@cwsl.edu)) for A/V needs.

- **How to Obtain Copyright Permission**  
Student organizations must obtain a Public Performance License from a licensing agent (i.e. [Swank Motion Pictures, Inc.](#)) to show a film. Some film makers are happy to charge only a token fee, others may request more.

You will need to be very specific when requesting permission and include the following information:

1. Indicate whether the screening is open to the public or for the California Western community only.
  2. Indicate the number of people you expect to view the movie.
  3. Indicate if you will be charging a fee.
    - Once you obtain written confirmation you must submit a copy to [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu).
- **Public Domain**  
 “Public Domain” refers to the body of creative works and knowledge in which no person, government or organization has any proprietary interest such as a copyright. Below are a few sites that contain movies commonly thought to be in the public domain, and works their owners are willing to let be distributed:
    - <http://www.fesfilms.com/>
    - <http://www.desertislandfilms.com/>
    - <http://www.reelmediainternational.com/>
    - <http://www.buyoutfootage.com/>
    - <http://archive.org/details/movies>
  - **Admission Fees**  
 If you are charging a fee for your event to non-CWSL individuals or organizations, then review the CWSL [Room Booking Policy](#) (page 20) for applicable room rental fees.

## **EVENT SCHEDULING: Master the CWSL Calendars**

In addition to a full schedule of classes, CWSL books more than 5,000 other room requests annually, including meetings, social events, academic events, student organization events, competitions, and community events. Start planning your event as soon as possible especially if it is a signature event such as a conference, large fundraiser, well known speaker, etc.

When choosing a date, review the [“Student Orgs” Office365 calendar](#) to find out if there is a conflict with another event.

Some additional considerations:

- Event Approval Form must be submitted well in advance and **no less than 4 business days prior** to the event. Student & Diversity Services and Facilities make every attempt to respond to a request within 48 hours from the date and time of receipt of the original request. To avoid potential problems, it is strongly recommended you submit the request at least two weeks in advance of your event.
- Student groups who wish to book a room may do so in the current trimester. Exceptions to this may be made with the approval from Student & Diversity Services for annual student events, etc. Rooms booked in advance of the current trimester are subject to being

bumped when the next trimester's class schedule is programmed into the schedule, as classes take priority over all other events.

## **EVENT LOCATION: Where will the event be located?**

### **Off-Campus Events**

Planning a Student Organization event held off-campus requires Student & Diversity Services approval as stated above. The next steps are dependent on the type of event being planned.

Key items to consider:

- Checking the "[Student Orgs](#)" [Office365 calendar](#) for the best date for the event
- Securing a location
- Reviewing Student Organization Reimbursement Policy regarding alcohol purchases for student organizations.
- Consulting with the resources at CWSL
  - Networking/Mixers: Career & Professional Development Office, Alumni Engagement
  - Fundraisers: Development, Student & Diversity Services
  - 501(c)(3) Statement, CWSL Insurance Certificate – Business Office
  - Community Service – other student organizations, CWSL departments

### **On-Campus Room Booking Procedures**

#### **Overview**

CWSL provides access to rooms such as classrooms and lobbies to student organizations for meetings and events. Before selecting your on-campus location, review the CWSL [Room Booking Policy](#) to learn important policies regarding:

- Table displays
- Posting of notices
- Bake/food sales
  - Please note Food Safety Procedures should always be followed
- Serving of alcohol
- Marketing of your event off-campus
- Compatibility with Institutional Mission (includes information on admittance fees)

**Student organizations may book the First and Second Floor lobbies in the 350 Building for purposes consistent with the mission of the student organization such as event sign-ups, ticket sales, bake sales, blood drives, etc.**

Please note that the display tables are allotted on a first-come, first-served basis and due to space limitations, not all requests will be approved.

- **First Floor Lobby - Requires 1 week prior booking through Event Approval Form**  
Any day of the week for a maximum of two (2) days per week



- **Second Floor Lobby**  
Tuesdays and Thursdays

## **Step by Step Guide to Booking Your Room**

- Student organizations must fill out a [Student Organization Event Approval Form](#). Forms are located on the [SBA website](#). (See appendix U.) This form will be automatically submitted to the office of Student & Diversity Services for approval. Please note that there is up to a **48-hour reply time**.
  - Requests made over the phone, via voicemail, or verbally in person will not be accepted. There will be no exception to this rule.
- Once approved, Student & Diversity Services will email the approval to the student organization and Rooms (for room booking confirmation). Please note that there is up to a **48-hour reply time** for Rooms to process the request.
- Once you receive your room booking confirmation from Rooms, you should:
  - 1) Request any special set-up such as tables and chairs, extra trash cans, etc. by forwarding your room confirmation e-mail to [Facilities@cwsu.edu](mailto:Facilities@cwsu.edu). NOTE: If tablecloths are needed you must request them **two weeks prior** to the event.
  - 2) Request Audio Visual equipment such as microphones, projectors, etc. by forwarding your confirmation e-mail to [EdTech@cwsu.edu](mailto:EdTech@cwsu.edu) at least 72 hours in advance of the event.

## **EVENT ADVERTISING: How to Get the Word Out**

### **POSTING OF YOUR EVENT**

- **Student Orgs O365 Shared Calendar**  
Once the event has been approved and the room booking confirmed, Student & Diversity Services will add the information to the [Student Orgs O365 Shared calendar](#).
- **Event Flyers**  
Flyers are an easy way to capture the pertinent information about your event in an attractive and appealing way. Consider creating flyers for all events. <http://www.canva.com> is a free resource for graphic design.
  - All flyers (electronic format either JPG or PNG) should be submitted to [studentservices@cwsu.edu](mailto:studentservices@cwsu.edu) for approval and inclusion in the Weekly Events slides on the monitor of the 350 building. Submissions must be received by 2:00 p.m. the Friday before.

- o **Email Blasts**

Please note that e-mail blasts to the student body are not allowed unless it is for an SBA event for the entire CWSL Community (which includes Faculty, Staff and Students) such as Barrister's Ball, CWSL Talent Show, etc.

- o **Social Media**

The Community Relations department can assist student organizations in promoting events through the CWSL social media channels, website, and newsletters. Please contact [News@cwsl.edu](mailto:News@cwsl.edu).

- o **Posters/Flyers**

Student organizations must get advanced, written approval from Student & Diversity Services in order to display posters in the First and Second Floor lobbies of the 350 Building.

It is recommended that you send a digital proof to [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu) prior to printing in order to avoid additional printing costs in the event the poster needs to be edited for content (examples of prohibited content: guns, images or references to alcohol, profanity, etc.).

- If you are using an image that you found on the internet you must make sure you are not violating copyright law. Please review the "[Using Images Created by Others](#)" policy (see Appendix M).

Event flyers may be attached to bulletin boards in the Student Kitchen, Student Lounge and on the 2<sup>nd</sup> floor. Posters should be removed after the event. Questions? Contact SBA Administrator at [SBAAdmin@law.cwsl.edu](mailto:SBAAdmin@law.cwsl.edu).

Please note that **flyers are not allowed** in any other areas of campus. Please review the "[Posting of Notices and Announcements](#)" policy (see Appendix J).

## PRINTING MATERIALS

- o **Copy Center**

You may submit items for copying to the on-campus Copy Center located in the Faculty Support Services Office (225 Administration Building, Third Floor). Please provide adequate time for them to make copies, especially during exam periods. Your charges will be billed to your organization's account.

- o **External Vendors**

You may use any vendor for copying services, but you may not establish accounts for billing to the law school. You will be held personally responsible for any accounts set up for your student organization.

When working with external vendors, you may:

- o Pay the bill and submit a [Student Organization Reimbursement Form](#); or
- o Obtain an invoice and submit a [Student Organization Vendor Check Request Form](#) to request payment by check. Please note it

can take up to two (2) weeks for the Business Office to complete the process.

## **STUDENT ORGANIZATION FINANCIAL POLICIES**

CWSL students are charged a student activity fee (\$75) for each trimester in which they are enrolled. A portion of the fee (\$45) is distributed to the SBA to fund SBA and SBA-recognized student organizations' activities. The rest is applied to commencement regalia.

All active student organizations are eligible to receive funding. Each trimester active organizations seeking funding must submit a request for funds through a formal process known as a Budget Hearing. Once an organization has been granted funds by the SBA Board of Representatives it is able to request reimbursement of funds or to pay a vendor for an approved event.

### **How do I pay for event expenses?**

#### **General Rules**

There are a few expenses which will **NOT** be reimbursed:

- Gift cards
- Alcoholic beverages

CWSL Business Office policies determine reimbursable expenses. If you are not sure whether your expense is reimbursable, please Student & Diversity Services at [studentservices@cwsl.edu](mailto:studentservices@cwsl.edu).

#### **Funding Sources**

Student organizations have two main sources of funding:

- **SBA Allocated Funds**

The SBA Board of Representatives allocates funds to organizations each trimester. All SBA funded events must be open to the entire student body.

- **Student Organization Dues Account**

Student organization funds collected from members either on a trimester or yearly basis. Dues accounts are managed by the CWSL Business Office ONLY. You may contact Donna Knapp ([dknapp@cwsl.edu](mailto:dknapp@cwsl.edu)) for a statement of your dues account balance.

- Dues may be collected via cash or check ONLY and must be deposited in the Business Office in the 225 Building, 1<sup>st</sup> floor.
- All checks for dues must be made payable to "California Western". Write the organization's name in the memo line of the check. Checks not made payable to California Western will NOT be accepted by the Business Office.

- Do **not** use online payment systems (ex. Paypal, Venmo, etc.) for collection of dues. These methods of monetary exchange use personal bank accounts which co-mingle funds of the student and the members.

## **Before the Event**

Prior to the event, there are two options to pay for event expenses:

- Vendor Check Request Form
- Student Organization Advance Request (SOAR)

Both methods require completed forms to be submitted *at least 14 calendar days* before payment is due.

## **Vendor Check Request Procedure**

The vendor check request form is used to pay a vendor directly for goods and/or services relating to student organization activities.

- Vendor Check Requests **will only be processed if the event was approved by Student & Diversity Services** and:
    - The student organization's budget has been approved by the SBA; and/or
    - There are sufficient funds in the student organization's dues account
1. Obtain a [Student Organization Vendor Check Request Form](#) from the [SBA website](#) and complete with relevant information (see Appendix Q).
  2. Attach a detailed invoice from the vendor that contains the following:
    - Name of the company or payee that provided the goods and/or services
    - Description of the goods or services provided
    - Client name listed as California Western School of Law c/o [STUDENT ORGANIZATION]
    - Amount due

Attach a Form W-9 if the vendor/payee is new (please check with the Business Office).

Include a valid business purpose - necessary per I.R.S. regulations.

- This should accurately describe the event and the purpose of the event. For example, "t-shirts" is not sufficient. However, "t-shirts for student initiation ceremony" is sufficient.
3. Submit completed form with all attachments to the SBA Treasurer **at least 14 days prior to when the check is needed**.

4. The Business Office processes check requests once a week. After the SBA Treasurer processes the request, s/he obtains approval from the Assistant Dean for Student & Diversity Services.
  - o The approved request then goes to the Business Office. You will be contacted when the check is ready to be picked up by the Business Office. The entire process can take up to three (3) weeks.

### **Student Organization Advance Request (SOAR)**

For student organization expenses in excess of \$75.00, you may request an advance of funds. The amount requested must be available in the dues account or approved by the SBA through budget process.

#### **Procedure for advance**

Students must complete a [Student Organization Advance Request Acknowledgment Form](#) (SOAR) (see Appendix N) available on the [SBA website](#). The process may take up to 14 calendar days. Plan accordingly.

- If amount requested is in excess of \$250.00, attach quote to support advance request.

Please check with the SBA Treasurer before completing the form to see if the funds requested are available ([SBATreas@law.cwsl.edu](mailto:SBATreas@law.cwsl.edu)). Submit the SOAR form directly to Riley Davis in the Student Center.

- i. Once approved by the Assistant Dean the form will be submitted to the Business Office for processing.
- ii. The Business Office will follow its normal check issuing procedure (i.e. requests submitted by close of business on a Wednesday will be available for pick-up on Friday of the following week).
- iii. Students will have **14 calendar days** from the date of the check to submit the [Student Organization Advance Request Reporting Form](#), (see Appendix O) available on the [SBA website](#), with supporting documentation and original receipts to SBA Treasurer.
- iv. Failure to submit the required documentation and/or return any unused cash by the deadline may result in the following actions at the discretion of the Assistant Dean:
  - a) Amount may be reported to the Internal Revenue Service as compensation to the student.
  - b) Student may have a Business Office hold placed on the student's account.
  - c) Student Organization may be prohibited from further reimbursements during the trimester.
  - d) Student Organization may be prohibited from seeking SBA funds the following trimester.
  - e) An Honor Code violation may result.

## After the Event – How do I get reimbursed?

### Things to Know

Every event MUST be approved by Student & Diversity Services. Reimbursements will only be processed if the student organization's budget has been approved by the SBA and/or there are sufficient funds in the student organization's dues account.

### Procedure

1. Obtain a [Student Organization Reimbursement Form](#) from the [SBA website](#) and complete with relevant information (see Appendix P).
2. Include a valid business purpose.
  - This should accurately describe the event and the purpose of the event. For example, "lunch meeting" is not sufficient. However, "lunch meeting to discuss the organization's trimester events" is sufficient.
3. Attach:
  - Method of payment receipt and detailed receipt (listing specifically what was purchased).
  - **\*NEW\*** As of 8/1/18 photos of receipts will be excepted if the original is unavailable. Under exceptional circumstances, if you are unable to obtain an itemized receipt, a written detailed description of what was purchased must accompany the receipt showing payment was made
  - If you are unable to obtain an itemized receipt for purchases of \$75.00 and higher, you must submit a [Student Organization Missing Receipt Form](#) (see Appendix S).
  - If a check was used to pay the expense, you must attach a copy of the cancelled check (front and back)
4. Submit completed form with all attachments to the SBA Treasurer within **30 days** of the event. **Submissions received past 30 days will be denied.**
5. The Business Office processes reimbursement requests once a week. After the SBA Treasurer processes the request, s/he obtains approval from the Assistant Dean for Student & Diversity Services.
6. The approved request then goes to the Business Office. The entire process can often take up to **two (2) weeks**.

## **COMMUNITY RELATIONS**

The Director of Community Relations handles marketing & communications for the law school. They manage all print publications, media relations, branding (logos, etc.), and the official CWSL News blog, Facebook, Twitter, LinkedIn, and YouTube channels, among other responsibilities. If you have questions regarding marketing or best practices for social media promotion, email Marilyn Jordan, Director of Community Relations, at [mjordan@cwsl.edu](mailto:mjordan@cwsl.edu).

Student organizations wishing to include the official California Western nameplate (logo) on brochures or materials must contact [News@cwsl.edu](mailto:News@cwsl.edu). Those using the school nameplate will be required to comply with the official Style Guide and provide a copy of the final product.

If you are inviting members of the media to an on-campus event or class, you must inform **Security** and **Community Relations**. Our security policies require that the Director of Community Relations be informed when media are on campus.

Student organizations with compelling stories to share (i.e. service projects, tutoring, major accomplishments, etc.) are welcome to submit those stories to [news@cwsl.edu](mailto:news@cwsl.edu) for consideration. Here are some tips to keep in mind when promoting your projects and news items, either to the Marketing & Communications department or to the media/public through your own efforts:

- Be prepared to explain why your news item is interesting - what's different about it?
- Explain how your news item supports or demonstrates concepts you are learning in law school
- Provide just enough useful information (who, what, when, where, etc.) with a contact name and information for follow-up
- Provide two weeks' notice, not the day of or day before an event
- If seeking coverage after an event or newsy development, follow up right away; news can get "stale" very quickly
- Include photos, if you can

### **Social Media Guidelines for Student Organizations**

All student organizations must comply with the CWSL Social Media Guidelines (see Appendix K) approved in January 2014. The guidelines provide appropriate best practices for California Western student organizations with social media channels in order to maintain a professional online presence for the law school and to protect the reputation of the law school.



## **STUDENT & DIVERSITY SERVICES STAFF** **INFORMATION**

### **Susan Finster, Esq.**

#### **Assistant Dean for Student & Diversity Services**

Dean Finster provides leadership, management and direct services in the area of student affairs and is responsible for counseling students on academic and non-academic issues, implementing support programs and managing disability services (ADA). In addition to advising for more than thirty student organizations, she works closely with the Student Bar Association. In collaboration with the Dean of Student Life, Dean Finster helps resolve disciplinary issues, including investigating Honor Code violations and student conduct complaints. She also oversees Commencement, Student Recognition Programs, and many other campus events and programs.

### **Stacie Patterson, Esq.**

#### **Associate Director of Diversity & Inclusion**

Stacie Patterson supports and assists students and colleagues with the goal of promoting access, empowerment, and resource sharing. She advises and supports diverse student organizations and leaders, engages with diversity bar associations and legal community members, and coaches students on issues arising from leadership, personal and financial concerns. Ms. Patterson also administers the Buddy Program and ABA Judicial Clerkship Program.

### **Riley Davis**

#### **Program Assistant – Student Activities**

Riley Davis provides assistance, support and administration of SDS programs and events. She is the primary liaison to all student organizations and assists in creating and implementing programs to engage, support and develop student leaders. Ms. Davis also engages with our legal partners to support student organizational relationships in the San Diego legal community.

### **Jessica Placido**

#### **Program Assistant – Student Support**

Jessica Placido provides assistance, support, and administration for SDS programs and events. She is the primary point of contact for the implementation of the ADA on campus. She assists with creating and implementing programs or events to support students with a focus on programming to support student success. Ms. Placido is responsible for coordinating and implementing student retention and recognition events.

## **CWSL KEY CONTACTS FOR STUDENT ORGANIZATIONS**

### ❖ **Academic Achievement**

350 Building, First Floor  
Kiyana Kiel – Assistant Dean for Academic Achievement  
(619) 515-1578  
[kkiel@cwsl.edu](mailto:kkiel@cwsl.edu)

### ❖ **Alumni Engagement**

350 Building, Second Floor  
Lori Boyle – Director of Alumni Engagement  
(619) 515-1543  
[LBoyle@cwsl.edu](mailto:LBoyle@cwsl.edu)

### ❖ **EdTech/Audio Visual Department**

350 Building, Third Floor  
(619) 525-1454  
[EdTech@cwsl.edu](mailto:EdTech@cwsl.edu)

### ❖ **Business Office**

225 Administration Building, First Floor

Tolly Dewey  
Controller  
(619) 515-1595  
[tdewey@cwsl.edu](mailto:tdewey@cwsl.edu)

John Virissimo Jr. – Senior Accountant II  
(619) 515- 1572  
[jiv@cwsl.edu](mailto:jiv@cwsl.edu)

### ❖ **Career and Professional Development Office**

350 Building, Second Floor  
(619) 525-7089

Jocelyn Salvatori – Assistant Director  
[JSalvatori@cwsl.edu](mailto:JSalvatori@cwsl.edu)

Noelle Dorman  
[ndorman@cwsl.edu](mailto:ndorman@cwsl.edu)

### ❖ **Community Relations**

225 Administration Building, Second Floor  
Marilyn Jordan – Director of Community Relations  
(619) 515-1545  
[mjordan@cwsl.edu](mailto:mjordan@cwsl.edu)

❖ **Computer Lab**

290 Library Building

Daniel Starnes - Computer Lab Support Technician

(619) 525-1473

[DStarnes@cwsl.edu](mailto:DStarnes@cwsl.edu)

❖ **Development Office**

225 Administration Building, Second Floor

Brian Daly - Director of Development

(619) 515-1547

[BDaly@cwsl.edu](mailto:BDaly@cwsl.edu)

❖ **Facilities Management**

350 Building, Mezzanine Floor

Jolie Cartier - Executive Director for Facilities Management

(619) 525-1487

[Facilities@cwsl.edu](mailto:Facilities@cwsl.edu)

❖ **Student & Diversity Services**

350 Cedar Street, First Floor

Susan Finster - Assistant Dean for Student & Diversity Services

(619) 515-1575

[StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu)

# **Appendix A**

## **CONSTITUTION TEMPLATE**

---

### **ARTICLE I - NAME**

The first article of any group's constitution states what the name of that group shall be. The name should not be identical with that of an organization that already exists, and should reflect the essence of the organization.

**EXAMPLE:** The name of this organization shall be \_\_\_\_\_.

### **ARTICLE II - PURPOSE**

The second article of the constitution must state, as clearly as possible, the purpose of the organization.

**EXAMPLE:** The purpose of the (name of organization or group) shall be to \_\_\_\_\_.

### **ARTICLE III - MEMBERSHIP**

This article should clearly state the eligibility for membership (which should also contain an equal opportunity statement which provides access to membership regardless of race, color, religion, sex, national origin, age, sexual orientation, marital status, veteran status, or disability), types of membership offered and qualifications for voting in the organization. Membership must be open to all students, but requirements, such as paying dues or meeting certain grade point average standards may be included for voting members.

#### **EXAMPLE:**

SECTION 1. All registered law students shall be eligible for membership in the (name of group). Membership shall be open to any student regardless of race, color, religion, gender, creed, national origin, age, disability, sexual orientation, gender identity and/or gender expression, genetic information, marital status, and veteran status or disability.

SECTION 2. Voting members shall be designated as those persons who have attended \_\_\_\_\_ meetings in an academic trimester.

SECTION 3. Honorary (non-voting) memberships may be given to \_\_\_\_\_.

### **ARTICLE IV - OFFICERS**

This article should include the titles and special qualifications for all the officers of the organization. The method for electing officers, filling vacancies, and the length of term for each officer should also be specified. The duties of the officers will be part of the bylaws.

#### **EXAMPLE:**

SECTION 1. The officers of the organization shall be a President, Vice President, Secretary, and a Treasurer.

SECTION 2. All law students, whether or not they have previously been voting members of the organization, shall be eligible to hold office provided they are in good academic standing at the time of election.

SECTION 3. The term of office for the officers shall be from \_\_\_\_\_ of the regular academic year to the \_\_\_\_\_ of the following year.

SECTION 4. The officers shall be elected by a majority at the annual elections held on \_\_\_\_\_.

SECTION 5. Vacancies of offices shall be (appointed, elected) by \_\_\_\_\_.

### **ARTICLE V - MEETINGS**

This article should explain when and under what circumstances meetings of the organization are held. This article will vary widely depending on the size of the group, its purpose, and interest level.

#### **EXAMPLE:**

SECTION 1. The regular meetings of the voting membership shall be held every/at least \_\_\_\_\_ (week, month, etc.)

SECTION 2. Special meetings of the organization may be called by the President, or upon the requests of \_\_\_\_\_ members of the organization.

SECTION 3. A quorum for the conduct of official business shall be defined as \_\_\_\_\_ of the voting membership.

### **ARTICLE VI - RULES OF PROCEDURE**

The type of procedure for conducting the business of the organization and maintaining active recognition status at the law school should be specified. Robert's Rules of Order is recommended, but organizations may choose an alternative method of conducting their meetings if it better suits their needs.

#### **EXAMPLE:**

SECTION 1. Robert's Rules of Order shall be the parliamentary authority of this organization. Should Robert's Rules of Order conflict with this Constitution, this Constitution takes priority.

SECTION 2. In order to maintain active status, the organization agrees to abide by those rules and procedures, including financial regulations of Salem State University and the Student Bar Association, which pertain to all student groups and organizations.

### **ARTICLE VII - AMENDMENTS**

A procedure for amending the constitution must be placed in every constitution. The procedure should be clearly outlined and as specific as possible.

**EXAMPLE:**

SECTION 1. Amendments to this Constitution may be proposed by either the officers or voting members of this organization.

SECTION 2. Consent by two-thirds (2/3) of the voting members shall be necessary to approve amendments to this Constitution.

## Appendix B

# BYLAWS TEMPLATE

### ARTICLE I - DUTIES OF OFFICERS

This section should specifically outline the duties of each officer of the organization. These are general duties for basic positions; depending on the nature of a particular organization the duties and officers may be different.

#### EXAMPLE:

SECTION 1. The duties of the President shall be to:

- a. Preside over all regular membership meetings.
- b. Call for special meetings when necessary
- c. Sign all financial documents of the organization
- d. Serve as the organizational representative.

SECTION 2. The duties of the Vice-President shall be to:

- a. Succeed the President should he or she for any reason be unable to carry out the Presidential duties.
- b. Assist the President in administering the business of the organization.

SECTION 3. The duties of the Secretary shall be to:

- a. Take brief minutes of each meeting and take care of any major correspondence concerning the organization as a whole.

SECTION 4. The duties of the Treasurer shall be to:

- a. Keep a record of all financial and historical documents and submit all financial records to the Student Bar Association and/or the CWSL Business Office as required.
- b. Sign all financial documents.
- c. Turn in all financial records for re-issue to the new Treasurer when required or appropriate.

### ARTICLE II - DUTIES OF ADVISOR

This article should clearly describe the role of the advisor in the organization. It should also indicate whether the advisor has voting privileges in the organization.

#### EXAMPLE:

SECTION 1. A faculty advisor shall be appointed by \_\_\_\_\_ of the voting members.

SECTION 2. The duties of the advisor shall be to:

- a) Attend the regular meetings of the organization



- b) Act as a consultant for the organization and any projects and special committees in the organization.
- c) Act as a liaison between the University and the organization, representing the interests of each.

SECTION 3. The advisor shall (shall not) have voting privileges in the organization.

### **ARTICLE III - COMMITTEES**

Although no organization is required to have a standing committee structure, this section would provide the opportunity to state the duties, powers, and a membership of any existing committees. At the very least it should provide for an ad-hoc committee that can be formed to consider questions of impeachment, sanctioning, and removal.

#### **EXAMPLE:**

SECTION 1. Ad-hoc committees.

- a. Shall be formed by the President, as deemed necessary, to investigate matters of immediate concern.
- b. The Chairperson and members of the ad-hoc committee will be appointed by the President, to be approved by a majority of the voting members of the organization.

### **ARTICLE IV - IMPEACHMENT**

Every organization must have some mechanism for the impeachment, sanctioning and removal of officers, members and advisors. These rules should never be used, however, without extremely good cause. Sanctions such as censure or reprimand may be imposed for minor violations, in accordance with this article.

#### **EXAMPLE:**

SECTION 1. Officers and/or members may be impeached on the basis of not fulfilling the purposes and policies of the organization as outlined in the Constitution and Bylaws or for violation of university and/or financial procedures.

SECTION 2. Any member of the organization may initiate impeachment proceedings by giving written notice to the President. If it is the President who is being impeached, notice should be given to the Vice-President.

SECTION 3. Upon formal notification, it is the responsibility of the President (or Vice- President) to convene an ad-hoc committee of inquiry to consider the filed allegations.

SECTION 4. Any individual who is impeached shall be given full notice of the allegations against him/her and shall have an opportunity to respond to them.

SECTION 5. The ad-hoc committee of inquiry will investigate the allegations, determine the validity of the charges, and make recommendations regarding sanctioning to the full body for its consideration.

SECTION 6. Recommendations for sanctioning made by the ad-hoc committee of inquiry must be approved by two-thirds (2/3) of the members present and voting, in order to be implemented.

SECTION 7. Possible sanctions include, but are not limited to, reprimand, censure, and/or removal.

SECTION 8. An individual may appeal his/her sanction by submitting an appeal request to the advisor of the organization within ten (10) calendar days of his/her notification of the sanction. If it is the advisor who has been sanctioned, appeals should be directed to the President.

SECTION 9. An appeal may be requested only on the basis of one of the following two claims:

- a. That there was procedural error in the conduct of the impeachment proceedings.
- b. That there is significant new evidence which was previously not available.

SECTION 10. The advisor shall determine whether there are grounds for appeal and may choose to affirm the sanction or remand the case for a rehearing by a new ad-hoc committee of inquiry.

SECTION 11. If an appeal hearing is granted based upon one of the conditions in Section 9, it will be conducted in accordance with the provisions of Sections 5-7, and with new evidence submitted or procedural error removed.

## **ARTICLE V - ELECTIONS**

Specific election procedures for the organization should include information on dates, eligibility, and rules for handling election procedure violations.

### **EXAMPLE:**

SECTION 1. Elections shall be held during the first/last \_\_\_\_\_ weeks of the \_\_\_\_\_ semester of each academic year.

SECTION 2. Candidates for offices shall be eligible provided they have met the requirements for that office as stated in Article III of the Constitution.

SECTION 3. Violations of election procedures shall be heard by \_\_\_\_\_.

## **ARTICLE VI - FINANCES**

This article should state the guidelines for use of dues (if there are any), income, and other funds.

### **EXAMPLE:**

SECTION 1. All finances shall be handled in accordance with the established fiscal procedures in effect for the Student Bar Association as outlined in the Student Organization Guide.

SECTION 2. In the event of loss of recognition, any funds remaining in the organization's account will revert back to the Student Government Association.

### **ARTICLE VII - INITIATION**

This article should state that the organization complies with Massachusetts's laws, which prohibit the practice of "hazing".

#### **EXAMPLE:**

SECTION 1. The (name of group or organization) does not engage in any initiation procedures which would be considered illegal under applicable state and federal law.

SECTION 2. Each year, every member, will be provided with a copy of Massachusetts General Laws Chapter 269, Sections 17, 18 and 19, as amended, and will be required to sign an acknowledgement of such receipt.

### **ARTICLE VIII - AMENDMENTS**

Because the Constitution and Bylaws are two separate documents, each must have an article, which provides procedures for amendment. This article can follow the same basic pattern as Article VII of the Constitution.

# SBA BUDGET INFORMATION PACKET

---

## CALIFORNIA WESTERN SCHOOL OF LAW STUDENT BAR ASSOCIATION



## 2018-2019 BUDGET INFORMATION PACKET

### CHECKLIST

- ATTEND Student Organization Pre-Budget Meeting (*by Organization's President & Treasurer*)
- COMPLETE Budget Form
- COMPLETE Philanthropic Memorandum Form
- REVIEW, INITIAL, and SIGN Student Organization / SBA Contract
- COMPLETE and SIGN Student Organization Information & Acknowledgement Form
- SUBMIT all completed/signed documents to [SBABORchair@law.cwsl.edu](mailto:SBABORchair@law.cwsl.edu) by **10am Friday, May 25th**
- KEEP a completed/signed copy of documents for the student organization's records

## MEMORANDUM

To: Student Organizations  
From: Student Bar Association (SBA)  
Re: SBA Budget & Allocation Policies & Procedures, Summer 2018  
Date: May 16, 2018

Following is an update and review on the SBA budget and allocation policies and procedures. **Please refer to the (1) Student Organization Guide on the SBA website for full policies and procedures, and (2) Student Diversity Services Leadership Webinar on the TWEN leadership website.**

Do not hesitate to contact the SBA Board Chairman at [SBABORchair@law.cwsl.edu](mailto:SBABORchair@law.cwsl.edu) with any questions or concerns.

### I. BUDGET HEARING

The SBA has voted to allow student organizations to “opt-out” of their budget hearing appearance. The “opt-out” option is indicated on the budget request form. However, each organization still has the opportunity to present its proposed schedule of activities and budget for the trimester to the SBA Board of Representatives (BOR).

**NOTE: If the budget packet is not timely submitted, the student organization will be required to attend the budget hearing.**

### II. BUDGET PREPARATIONS

Each organization is responsible for the following:

1. Obtain organization’s Dues Account Balance from Business Office  
(You can reach Donna Knapp at [dknapp@cwsl.edu](mailto:dknapp@cwsl.edu) or 619.515.1598)
2. Verify organization’s budget/allocations from last trimester  
(You may get this information from SBA Treasurer Brie Collings or student diversity services)
3. Submit organization’s list of officers with current e-mails to [StudentServices@cwsl.edu](mailto:StudentServices@cwsl.edu)  
(failure to do so will impact the timeliness of your reimbursements)
4. Prepare organization’s budget for Summer 2018 with details and explanations for each request  
(Be as thorough as possible, this will help the BOR determine their allocation)
5. Rank importance of organization’s events with #1= most important  
(Events already held must be listed as highest priority)
6. Multi-organization or multi-school events must indicate all organizations/schools involved; only one CWSL organization can request allocation of funds; however, **every** organization must list the event on their budget (if not the primary organization, indicate \$0.00 on the budget forms)
7. Keep a copy of the completed Budget Allocation Request Form for the organization’s records

8. Submit the complete budget packet to [SBABORchair@law.cwsl.edu](mailto:SBABORchair@law.cwsl.edu) by **10:00 am, Friday, May 25th**

### III. BUDGET QUALIFIED EVENTS & ITEMS

#### **Events & Items that ARE permitted:**

- Up to two (2) speaker events per trimester (names of speaker(s) must be listed on the budget form)
- Honorariums (gifts for guest speaker). Limited to \$100 per trimester.
  - Cannot give honorariums to CWSL faculty or staff.
  - Cannot be cash or gift cards!
- Two (2) or more general meetings open to all CWSL students and advertised to all students.  
(note: each organization is required to have at least 2 general meetings)
- Networking/Social Events & Mixers.

#### **Events & items that are NOT permitted:**

- Office supplies
- Events NOT open to all CWSL students
- Alcoholic beverages

### IV. BUDGET ALLOCATION PROCESS & HEARING

The BOR considers the following factors when allocating SBA budget funds:

- Number of current organization members
- Anticipated attendance and history of attendance and similar organization events
- Type and number of events the organization is planning and in comparison to prior trimesters
- Ranking of the events
- Impact of the event for the school (eg: publicity, guest speaker, etc.)
- Organization's financials (dues account, fundraising/donation, national organization budget, etc.)
- Organization's prior utilization of SBA allotted funds.

The Budget Hearing is scheduled for **Wednesday, May 30th at 6:30 - 8pm.**

- Each organization will be assigned 10 minutes to allow an opportunity to discuss its budget, ask questions of the BOR, and answer any questions posed by the BOR.
- An organization may "**opt-out**" of the budget hearing appearance if all budget forms have been timely submitted. However, the board reserves its right to call the organization to appear for the budget hearing.
- An executive board member and a knowledgeable representative regarding the budget proposal and planned events must attend the hearing.
- **Missing the budget hearing time slot results in the organization possibly forfeiting its requested funding due to their inability to fully explain its budget.**

### V. REQUIREMENTS OF ORGANIZATION ALLOCATED FUNDS

**Each organization MUST spend 75% of the allocated budget for the semester.** If not, the penalties are as follows:

1. Upon the first trimester an organization does not meet their spending requirements, the organization will receive a warning from the board of representatives.
2. Upon the second trimester an organization does not meet their spending requirements, the organization will be placed on probation and notified by the board of representatives of the probation. Probation results in critical examination by the board of representatives of any future budget requests.
3. Upon the third trimester an organization does not meet their spending requirements, the organization will not be eligible for funding for one (1) trimester. The forfeited funding will apply to the trimester following the organization's third violation.
  - Notice shall be given within 24 hours in written or electronic form to all parties affected when punitive action may be taken by the board of representatives against a recognized student organization. The purpose is to allow the parties involved an opportunity to defend themselves before punitive action is taken.

#### VI. PHILANTHROPIC REQUIREMENT

Each organization must host a philanthropic event. To ensure this requirement is met, a philanthropic memorandum must be submitted with the budget request form. This memo must contain:

1. Description of the anticipated philanthropic activity/event for the upcoming trimester
2. Description of the philanthropic activity/event from the prior trimester. The information must include:
  - a. Number of members who participated
  - b. Amount raised or number of items donated
  - c. Feedback from beneficiary regarding the organization's involvement, if any.
  - d. If the organization is new or was not active in the prior trimester, the memo must reflect this information.

**SBA Community Outreach will be planning 2-3 philanthropic events per trimester that multiple student organizations can co-sponsor. This is highly encouraged in order to have larger events with more impact on the community. The organizations level of participation will determine whether the philanthropic requirement is satisfied, which is decided by the SBA Community Outreach Director(s) and the SBA Executive Board. More information will be provided as soon as its available.**

### PHILANTHROPIC MEMORANDUM SUMMER 2018

Student Organization:

\_\_\_\_\_

#### ANTICIPATED PHILANTHROPIC EVENT FOR SUMMER 2018

- We intend to co-sponsor the event(s) with SBA Community Outreach

Name/Title: \_\_\_\_\_

Anticipated Date:

\_\_\_\_\_



We DO NOT intend to co-sponsor an event with SBA Community Outreach

Name/Title:

\_\_\_\_\_

Anticipated Date:

\_\_\_\_\_

Multiple Org. Event? NO YES: (list other organizations):

\_\_\_\_\_

Description:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PRIOR PHILANTHROPIC EVENT**

Name/Title:

\_\_\_\_\_

Date Completed:

\_\_\_\_\_

Multiple Org. Event? NO YES: (list other organizations):

\_\_\_\_\_

Description: (include number of participating members, total amount collected, etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Attach any feedback, letters, or statements from the philanthropy beneficiary.*

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

**STUDENT ORGANIZATION INFORMATION & ACKNOWLEDGEMENT FORM**

SUMMER 2018

Student Organization:

\_\_\_\_\_

<u>Title</u>	<u>Name</u>	<u>E-mail</u>	<u>Phone</u>
--------------	-------------	---------------	--------------

<b>President</b>			
<b>Vice President</b>			
<b>Secretary</b>			
<b>Treasurer</b>			

**INFORMATION REGARDING ORGANIZATION'S PERFORMANCE:**

<b>No. of dues Paying Member:</b>	
<b>Average attendance at events:</b>	
<b>Membership dues (per trimester/year)</b>	
<b>Dues account balance</b>	

**INFORMATION OR EXPLANATION REGARDING PRIOR SBA FUNDED BUDGET & SPENDING:**

*(Please articulate any explanations regarding any discrepancies on past budget requests, reimbursement issues, or any violations of the 75% rule. Also, please state any further information to be considered by the SBA Board of Representatives when allocating budget funds.)*

---



---



---



---

I have read and understand the Memorandum regarding SBA Budget & Allocation Policies & Procedures for Summer 2018 and agree to abide by the guidelines and procedures throughout the Budget Request and Allocation process as outlined in the Student Organization Guide.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

# STUDENT ORGANIZATION / SBA CONTRACT

SUMMER 2018

Student Organization:

---

- |                            |                            |   |
|----------------------------|----------------------------|---|
| <u>        </u><br>Initial | <u>        </u><br>Initial | <p>1. <b>Budget Presentation</b></p> <p>I understand that a knowledgeable representative of our student organization will be given an opportunity to present the group's trimester budget to the SBA Board of Representatives (BOR) and answer its questions. Furthermore, I understand that if we miss our appointment to meet with the BOR, we will jeopardize our organization's trimester budget. Further requests for trimester funding will be reviewed on a first come, first serve basis and only as funds become available.</p>  |
| <u>        </u><br>Initial | <u>        </u><br>Initial | <p>2. <b>Philanthropic Event Requirement</b></p> <p>I understand that a requirement for obtaining trimester funds is to perform a philanthropic event that helps the community in some respect. This event will either be a fundraiser for a charitable organization, the group's participation in a local charitable event, or the group's co-sponsorship of an SBA Community Outreach event. The purpose of this activity is to increase the community's awareness and recognition of California Western and my organization. I further understand that if my organization fails to submit a philanthropic memo, any and all allocated funds will not be disbursed.</p> |
| <u>        </u><br>Initial | <u>        </u><br>Initial | <p>3. <b>Failure of an Event to Occur</b></p> <p>I understand that once a scheduled SBA-funded event does not occur, the BOR will automatically reabsorb the funds allocated to the event and may use them to fund the organization's other pending fund requests.</p>  |
| <u>        </u><br>Initial | <u>        </u><br>Initial | <p>4. <b>Reallocation/Change Request</b></p> <p>I understand that if I submit a "Reallocation/Change Request" for an event not originally listed on the budget request, the BOR must review the event as a new allocation and allocate funds as available.</p>  |
| <u>        </u><br>Initial | <u>        </u><br>Initial | <p>5. <b>Events Sponsored by SBA Funds</b></p> <p>I understand that any activities or events funded by the SBA must be open to all students of California Western, whether or not they are officially or unofficially a part of my organization and whether or not club dues have been paid by the student. Further, I understand that the event must be easily accessible to the student body.</p>   |
| <u>        </u><br>Initial | <u>        </u><br>Initial | <p>6. <b>Inactive Organizations</b></p> <p>If my group is to become inactive for one calendar year (three trimesters), I authorize the SBA to absorb any and all funds in our group's organizational dues account and incorporate any funds into the SBA's general funds account to be used for all groups' funding purposes. The purpose of this rule is to prevent waste of unused resources.</p>   |

\_\_\_\_\_  
Initial

\_\_\_\_\_  
Initial

7. **Governing Rules**  
I understand the above rules and pledge to follow them. I further understand that additional rules may be added to the above rules as the BOR deems necessary and the nature of such new rules will be explained to me orally or in writing.

\_\_\_\_\_  
Initial

\_\_\_\_\_  
Initial

8. **Authority**  
I am currently an active member/leader of my organization and have been given authority to sign as a representative of my group into this contract.

**Representative #1:** Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

**Representative #2:** Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

**SBA BUDGET ALLOCATION REQUEST FORM**

SUMMER 2018

Student Organization:  
\_\_\_\_\_

We WILL be attending the Summer 2018 budget hearing.

Representative Name/E-mail:  
\_\_\_\_\_

We WILL NOT be attending the Summer 2018 budget hearing.

Event Priority	Event Date	Proposed Event	Anticipated Attendance	Itemized Description of Funds Purpose	Total Event Budget	Amount paid by Dues Account	Amount requested from SBA
1					\$	\$	\$
2					\$	\$	\$
3					\$	\$	\$
4					\$	\$	\$
5					\$	\$	\$
6					\$	\$	\$
7					\$	\$	\$
				<b>TOTAL AMOUNTS</b>	\$	\$	\$

Event Priority	Event Date	Proposed Event	Anticipated Attendance	Itemized Description of Funds Purpose	Total Event Budget	Amount paid by Dues Account	Amount requested from SBA
				<b>REQUESTED</b> :			
				<b>TOTAL AMOUNTS APPROVED:</b> <i>(SBA use only)</i>			\$

/s/

Signature: Student Organization President  
Date

Signature: SBA Chairman of the Board  
Date

/s/

Signature: Student Organization Treasurer  
Date

Signature: SBA President  
Date

## EXAMPLE

### SBA BUDGET ALLOCATION REQUEST FORM

SUMMER 2018

Student Organization:  
\_\_\_\_\_ OWLS \_\_\_\_\_

We WILL be attending the Summer 201 budget hearing.

Representative Name/E-mail:  
\_\_\_\_\_ student@law.cwsl.edu \_\_\_\_\_

We WILL NOT be attending the Summer 201 budget hearing.

Event Priority	Event Date	Proposed Event	Anticipated Attendance	Itemized Description of Funds Purpose	Total Event Budget	Amount paid by Dues Account	Amount requested from SBA
1	06/14/18	Panel Speaker & Networking Mixer (multi-org event with: SBA and MELSA)	60-80	Food & Service (catering) Non-Alcoholic Beverages Room/Venue Deposit Entertainment (cultural dancers)	\$300.00 \$75.00 \$250.00 \$250.00	\$100.00 \$0.00 \$200.00 \$50.00	\$200.00 \$75.00 \$50.00 \$200.00

Event Priority	Event Date	Proposed Event	Anticipated Attendance	Itemized Description of Funds Purpose	Total Event Budget	Amount paid by Dues Account	Amount requested from SBA
2	6/31/18	General Meeting #1 w/ lunch	10-15	Food & Non-Alcoholic Beverages	\$100.00	\$25.00	\$75.00
3	7/10/1	General Meeting #2 w/ lunch	10-15	Food & Non-Alcoholic Beverages	\$100.00	\$25.00	\$75.00
				<b>TOTAL AMOUNTS REQUESTED:</b>	<b>\$1,075.00</b>	<b>\$400.00</b>	<b>\$675.00</b>
				<b>TOTAL AMOUNTS APPROVED:</b> <i>(SBA use only)</i>			\$

*/s/ Jane Doe*

\_\_\_\_\_  
Signature: Student Organization  
President                      Date

\_\_\_\_\_  
Signature: SBA Chairman of the Board  
Date

*/s/ John Doe*


\_\_\_\_\_  
Signature: Student Organization  
Treasurer                      Date

\_\_\_\_\_  
Signature: SBA President  
Date

## Appendix D

# TWEN: TRANSFERRING ADMINISTRATIVE PRIVILEGES

1. Previous Executive Member with Administrative Access needs to login to <https://lawschool.westlaw.com>

2. CLICK 
  - a. Open the Student Org Page to transfer administrative status
    - i. Guide your mouse to the left hand “Navigation” column

THOMSON REUTERS  
**WESTLAW**

NAVIGATION

- ii. Then, CLICK “Manage Course” in the “Display for Faculty

**Display for Faculty Only**  
CALI Lessons  
**Live Discussion**  
Assignments & Quizzes  
CiteStation  
Wiki  
Grade Book (F)  
Manage Course (F)

Only” options

1. Once Manage Course is open, CLICK the phrase “Manage Users”

*\*Note: The users icon will not direct to a new page.*



### Manage Users

Add, remove, or revoke user access to the course.

- a. Enter the student member who is going to be assigned administrative functions in the search

**Users**  
Search Search course participants...

box:

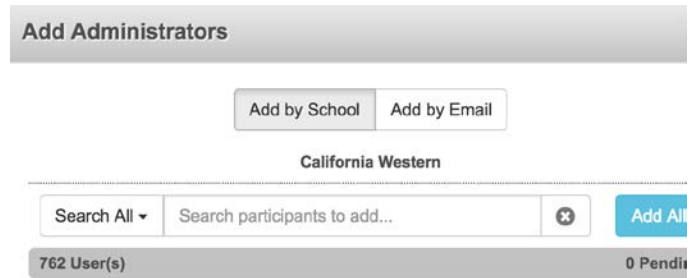
- b. CLICK  to remove the searched student as a “Full Participant”


- c. Then, CLICK  in the **Administrators** row




*\*Note: An “Add Administrators” Box will pop up.*



- d. Enter the Removed Student in step 2(a)(i)(1)(b) in the “Add Administrators” search box



- e. **CLICK** the  icon that appears next to the Removed Student’s name that you want to add as an administrator.
- f. **REPEAT** steps 2(a)(i)(1)(a)-(e) for all other board members needing administrative privileges.  
*\*Advice: Only President and Vice President need Admin functions.*  
*\*Note: Any member can send out an email blast through Twen to the Org.*
- g. **When done adding administrators:**

- i. **CLICK**  to remove all past board members.
- ii. **CLICK**  in the “Full Participant” Row
- iii. Enter the Removed Board Member in the “Add Full Participant” search Box.
- iv. **CLICK** the  icon that appears next to the Removed Board Member’s name and add the past Board Members as a regular member.
- v. **REPEAT** adding process for all removed Board Members.
  1. **OR**, send a reminder to all removed Board Members to add the student org to their TWEN pages.

## Appendix E

# MANDATORY CONTINUING LEGAL EDUCATION CREDITS (MCLE)

Events which qualify for California Mandatory Continuing Legal Education (MCLE) credits must comply with the [State Bar rules](#) (rule 3.601).

For examples of activities that do and do not qualify for MCLE credit [click here](#).

Due to the requirements for State Bar approval, planning should begin at least six months before event date.

### PROCEDURE FOR SCHEDULING MCLE EVENT

1. Review [MCLE rule](#).
2. Contact Francine Vasquez at least one month prior to the event to obtain the CLE Activity Request Form. The form must be completed and sent back to Francine Vasquez at least one week prior to the event date along with the following items:
  - a. Speaker Roster including their titles, Bios (abridged), and their qualifications (concise) to present CLE on the subject area;
  - b. Detailed Agenda of the presentation / panel discussion(s);
  - c. Copy of the advertisement / flyer; and
  - d. Copies of the Substantive Written Materials.
    - Required if your activity is longer than 60 minutes.
    - Materials should augment the class discussion with citations to legal authorities (statutes, case law) so that attendees have useful information that they can reference if they want to learn more.
3. Francine will prepare the attendance sheets, certificate of attendance and other documents to send back to you. It is your responsibility to print out these materials and make sure they are completed by all attendees.
4. After the event submit the following items to Francine:
  - a. Completed record of attendance (originals with printed names, bar numbers and signatures) which the law school must retain for four (4) years; and
  - b. Completed Activity Evaluations (names optional) which the law school must retain for one (1) year.

### TIPS ON PRESENTING AN MCLE EVENT

Helpful planning suggestions to consider *before* scheduling an MCLE event:

1. Define the objectives. What will the participant learn and be able to do at the conclusion of the course?
  - a. Clearly state the goals and learning objectives for the course.
  - b. Determine how the program will change or enhance the attorney's attitude, knowledge, and skill at the conclusion of the course.
  - c. Develop a framework for selecting the learning materials, content, and method of delivering the program (live, online, lecture, interactive, etc.).
  - d. Provide an accurate description of the course.
2. If the program is intended for MCLE credit, the subject matter must be addressed specially to the attorneys.
3. Provide substantive written materials when the activity is more than one (1) hour in its presentation.
4. Define your audience. If your topic is based on a subject that can easily be converted or presented to any other group of professionals, and is not limited to attorneys and the legal education field, it may not be acceptable for MCLE credit. Examples of unacceptable topics may include:
  - a. Laws of Nature
  - b. Paralegal Courses and Annual Paralegal Retreats
  - c. Basic Computer Training
  - d. How to Make Your Website a Rainmaker
  - e. Quality of Life - Work Balance and Transitioning Away from the Practice of Law
  - f. Marketing or Advertising of Services to Gain New Clients (topics in which the primary focus is generating new business)
  - g. Topics to increase income for the firm or attorney's gain/profit; rainmaking to develop new clients; and building a niche practice or business.
  - h. Motivating employees
  - i. Stress management, and meditation/yoga retreats

## Appendix F

# FUNDRAISING POLICY AND PROCEDURES FOR STUDENT ORGANIZATIONS (8/2015)

---

## 1. General Policies

- 1.1. These policies apply whenever students individually or as student organizations seek to raise funds as charitable donations under the non-profit status of CWSL.
- 1.2. All fundraising activities except bake or food sales must be approved by the Assistant Dean for Student & Diversity Services and the Development Department at least three (3) months in advance of the fundraiser. Requests submitted less than three (3) months in advance may not be approved.
- 1.3. All Student Organizations are encouraged to meet with the Development Department once the event is approved to discuss the fundraising strategy.
- 1.4. Fundraiser materials (emails, flyers, letters, etc.) must be submitted to the Development Department at least two (2) months prior to the fundraiser. All such materials must be approved by the Development Department prior to use.
- 1.5. Student organizations may not purchase goods (other than bake-sale items) in order to resell for a profit or to raise funds for any activities (e.g. a student organization may not purchase t-shirts with their organization's logo in order to resell for a profit). However, Student Organizations may purchase branded t-shirts from their dues accounts as giveaways for PR purposes or under section 4.3 below.
- 1.6. All California Western policies apply to students fundraising events and activities (e.g. room booking, Business Office, etc.).
- 1.7. All Student Organizations are strongly encouraged to select a CWSL fund or program for their fundraiser beneficiary.

## 2. Fundraising Policies for CWSL (Internal) Programs and Funds

- 2.1. Once the event is concluded, the student organization must submit all monies raised - along with backup documentation including donor's name, gift amount, and gift designation - to the Development Department for processing no later than one week after the date of the event.

- 2.2. All checks must be made payable to “California Western School of Law” with the program or fund name listed in the check’s memo line.
- 2.3. The Development Department will provide charitable tax acknowledgements to the donors directly for their donation, where appropriate.

### **3. Fundraising Policies for External Organizations and Charities**

- 3.1. The external benefitting charity or organization must be selected at least two (2) months in advance of the fundraising event. The student organization is responsible for selecting the charity and notifying the charity of their selection.
- 3.2. Donations supporting the external organization or charity must be in the form of check or cash. Credit or debit cards or on-line donation tools are not allowed. Donations made by check must be made payable to the external organization or charity.
- 3.3. All forms of payment must be collected by the student organization.
- 3.4. Cash donations must be submitted to the Business Office, along with a check requisition form, in order for a check to be cut to the charity.
- 3.5. The student organization must deliver all donations to the charity and should provide them with a list of the donors (donor name and donation amount) so that the charity or organization may acknowledge the donors directly.
- 3.6. Since California Western is not directly benefiting from the monies raised, California Western does not provide charitable tax acknowledgements to donors.

### **4. Types of Fundraisers – Specific Procedures**

#### **4.1. Auctions**

- 4.1.1. Prior to the auction event, the student organization must create a spreadsheet of donated auction items including donor’s name and contact information, auction item name, item description, and fair market value of item (donor must determine this value and independent support must be provided to the Business Office). At least two weeks prior to the auction, the student organization must schedule an audit of the auction items with the Business Office. This audit must be performed after all auction items have been received and entered into the spreadsheet. The final spreadsheet must be submitted to the Business Office at least 2 days prior to the auction for use in auditing the auction items.

4.1.2. After the auction, the student organization must update the auction spreadsheet to include the auction item purchaser's information, purchaser's name and contact information, and auction item purchase price to the spreadsheet. An approved auction template is available from the Development Department. The completed spreadsheet must be submitted to the Business Office no later than 10 **business days** after the auction.

4.1.3. The only student organizations authorized to conduct auctions are the Student Body Association (SBA) and Public Interest Law Foundation (PILF).

4.1.4. New auctions will be approved at the discretion of the Assistant Dean of Student & Diversity Services and the Director of Development. Student Organizations seeking to hold a new auction should seek approval at least six (6) months in advance of the event.

#### 4.2. Food/Bake Sales

4.2.1. Bake sales and food sales, whether products are homemade or store-bought, and whether or not they are being sold in conjunction with non-food products, are considered food sales. See CWSL Room Booking Policy.

4.2.2. No more than two (2) food sales are permitted per week, and they cannot be held on the same day or on a day when the Dean hosts a social event with food, such as "Coffee with the Dean."

4.2.3. Food sales are only permitted on the first-floor lobby at 350 Cedar Street; they may not be held on the second floor.

4.2.4. Per San Diego County Health Codes, only certain foods are allowed at Food Sales or any student organization tabling. Allowed foods are as follows:

- Pre-packaged foods like chips, cookies, granola bars, pretzels, crackers, candy, bottled or canned waters or soft drinks.
- Homemade baked goods like cookies, brownies, cupcakes.
- Food delivered to CWSL from restaurants, delicatessens, and/or grocery stores, like pizza, Einstein bagels, Rubio's, etc.
- Food prepared or served by licensed caterers like Donna Blain Coffee, Bettina's Custom Catering, etc.

The following foods are NOT allowed:

- Food that must be kept warm to be safe like cooked meats, casseroles, hot side dishes, nachos, chili, hamburgers, etc.
- Food that must be stored and displayed refrigerated like custards, mayonnaise-based foods, deli plates, cheese or meat sandwiches, hamburgers, hot dogs, barbeque pork or chicken, macaroni salad, ice cream, salads, sandwiches, etc.

### 4.3. Direct Donations to Student Organizations with Thank-You Gift Items (PBS Model)

4.3.1. Student Organizations may provide a “thank you” gift for a donors cash donation if the following policies are followed:

4.3.1.1. The fundraising campaign including the specific gifts to be provided to donors along with all promotional materials (see 4.3.3.1 below) must be approved by the Assistant Dean of Students & Diversity Services and the Development Department at least three (3) months in advance. Requests submitted less than three (3) months in advance may not be approved.

4.3.1.2. The fair market value of the thank-you gifts must be determined by the Development Department in collaboration with the student organization, and approved by the Business Office.

4.3.1.3. All fundraising solicitations and/or promotional materials must include the following language: “Your donation is tax-deductible less the fair market value of any goods or services received.” If a specific donation receives a specific item or good in return (e.g. if a donor donates \$25 they will receive a t-shirt as a thank-you for their contribution), the donor will only receive a charitable deduction of their donation less the fair market value of the thank-you gift.

4.3.1.4. Thank You gifts are delivered to the donor at least 48 hours after the receipt of the donation.

4.3.2. Once the donation period is concluded, the student organization must submit the following information to the Development Department within seven business days:

- Total donation amount
- Fair market value of the thank-you gift
- Tax- deductible amount (total donation amount less the fair market value of the thank-you gift)

4.3.3. The Development Department will provide charitable tax acknowledgements to the donors directly for their donation, where appropriate.

## Appendix G

# EVENT PLANNING CHECKLIST

### Audio-Visual/Technology

- Request sent to [EdTech@cwsl.edu](mailto:EdTech@cwsl.edu)
- Computer
- Printer
- Laptop access
- Internet access
- Software installation
- Staff assistance
- Photographer
- OH projection/screen
- LCD projector
- Microphone / PA system
- Podium: floor/tabletop
- Whiteboard w/ pens
- Flipchart w/ markers
- Request for Wi-Fi access
- Permissions obtained for recording
- Recording # of copies \_\_\_\_\_

### Catering

- Caterer confirmed: \_\_\_\_\_
- Menu confirmed: \_\_\_\_\_
- Beverages: \_\_\_\_\_

### Decorations

- Centerpieces
- Balloons

### Entertainment

- Musicians:  
\_\_\_\_\_
- Contract / Deposit sent  
\_\_\_\_\_

### Flyers

- Posted / distributed / mailed
- Obtain CWSL logo from Marketing and Communications
- Reminder emails to targeted group(s) of campus community
- Add to public-facing [calendar](#)

### Gifts/Awards/Mementos

- \_\_\_\_\_
- Date ordered: \_\_\_\_\_ Qty: \_\_\_\_\_
- Received

### Invitations

- Save-the-dated mailed:  
\_\_\_\_\_
- Invitations selected
  - printed: \_\_\_\_\_
  - mailed: \_\_\_\_\_
  - reminders sent: \_\_\_\_\_
- Letters mailed: \_\_\_\_\_

### Maintenance

- Request form submitted
- Staff assistance requested
- Linens / tables ordered

### Security

- Notification email sent
- Inquire w/ VIP if they travel w/ personal security who may be armed, and advise Facilities Director if armed
- Walkie talkie radios ordered, as needed

### Setup

- Cocktail reception
- Buffet
- Sit-down
- Registration table / chairs
- Wastebasket

### Signage

- Copy to printer: \_\_\_\_\_
- Received: \_\_\_\_\_

### Site Info

- Site selected:  
\_\_\_\_\_
- Onsite (CWSL) room booked:  
\_\_\_\_\_
- Offsite contract signed / sent:  
\_\_\_\_\_
- Offsite deposit sent:  
\_\_\_\_\_

### Speaker(s):

- \_\_\_\_\_
- Received bio / pic
- Confirm travel plans
- Hotel booked:  
\_\_\_\_\_



**Misc**

- Nametags
- Registration packets
- CWSL purple banner
- Printed materials / handouts
- Attendee / RSVP lists
- Office supplies
- Camera / Digital camera
- Cash box receipt book
- Drink tickets
- Event file

**Post-Event**

- Catering / rental / floral invoices received
- Check requests submitted
- Evaluation delivered
- Completed evaluation received

## Appendix H

# BACKWARD EVENT TIMELINE CHECKLIST

---

### *No fewer than 4 Weeks Ahead*

*[Note: during some times of the year this may be 4 - 8 weeks ahead]*

- Research and visit potential venues/rooms
- Check the [online, internal Events Viewer](#) and the public-facing [Calendar](#) to understand other events occurring on campus around or concurrent to your event.
- Get cost estimates (site/room rental, catering, AV/lights, etc.)
- Get bids for other major items
- Determine initial budget
- Compile mailing list (individuals/businesses)
- Check proposed date for potential conflicts, finalize date in writing
- Get written contracts for site, entertainment etc.
- Develop alternative site (if event is outdoors)
- Invite/confirm VIPs
- Inform Marketing and Communications
- Set marketing schedule
- Investigate need for special permits, licenses, insurance, etc.
- Complete mailing lists for invitations

### *No fewer than 3 - 4 Weeks Ahead*

- Send out invitations
- Set menu with caterer for food and beverage
- Secure permits and/or insurance
- Finalize audio/visual contract
- Order walkie talkie radios from Facilities (if needed, if budgeted)

### *At least 2 Weeks Ahead*

- Obtain contracts for rental items
- Hold walk-through of event with responsible committees, chairpersons and responsible site staff members at event site
- Check with VIP if they travel with personal security who may be armed, and if armed, advise the Facilities Director
- Review/finalize budget, task sheets and tentative timeline
- Start phone follow-up for guests
- Create check requests for payments to be made for the day of the event

### *1 Week Ahead*

- Confirm staff for registration
- Get enlarged site plan/room diagram, assign seats/tables
- Give estimate of guests expected to caterer/food service
- Meet with all outside vendors, consultants to coordinate event
- Give caterer revised numbers
- Meet with key staff to finalize any of the above

### ***1 Day Before***

- Confirm number attending
- Create name tags (as needed)
- Finish seating/table arrangements
- Distribute seating chart, assignments to hosts/hostesses
- Schedule pickup or delivery of any rented or loaned equipment
- Double-check arrival time and delivery times with vendors
- Reconfirm event site, hotel, transportation
- Deliver final scripts/ timelines to all program participants
- Finalize catering guarantee, refreshments
- Final walk-through with all personnel
- Establish amount of petty cash needed for tips and emergencies
- Recheck all equipment and supplies to be brought to the event
- Have petty cash and vendor checks prepared, if needed
- Inform Campus Security if media will attend

### ***Event Day***

- Be sure all VIPs are in place and have scripts/speaking points
- Go over all the final details with caterer and setup staff
- Check with volunteers to make sure all tasks are covered
- Setup registration area
- Check sound/light equipment and staging before rehearsal

## Appendix I

# SAMPLE TASK ASSIGNMENT LIST

<i>Event Title &amp; Date:</i>		
<b>Logistics</b>	<b>Staff Assignment</b>	<b>Completion Date</b>
Prepare projected event budget and submit for approvals		
Determine catering needs & place order(s)		
Catering, rentals, lighting, AV site visits		
Reserve equipment		
Finalize menu selections		
Finalize catering order numbers		
Order any gifts for speaker and/or attendees		
Check with photographer for availability		
Secure volunteers and/or student ambassadors		
<b>Program &amp; Speaker(s)</b>	<b>Staff Assignment</b>	<b>Completion Date</b>
Finalize speakers for event		
Contact speaker to discuss event - equipment needs, style of lecture, etc.		
Send draft scenario with suggested bullet points and send to VIPs for review		
Contact VIP offices to work on desired speaking points - they may request assistance with content		
Send final scenario and guest list to relevant volunteers and staff		
Submit final event scenario, current guest list, table seating assignments and seating diagram to VIPs		
Finalize presentation and load presentation on laptop/flash drive		
Send any updates to relevant volunteers and staff		
<b>Printed Materials &amp; Mailings</b>	<b>Staff Assignment</b>	<b>Completion Date</b>
Determine # of projected guests, invite groups and any research requests that may be necessary to create guest list		
Create invitation lists - contact VIP offices for any additional invitees they would like to include		
Create invitations and send to appropriate staff for review and approval		
Obtain a quote from printing company		
Finalize invite lists		
Send invitations to printer		

Stuff invitations, seal and stamp		
Send out invitations		
Update RSVP list and cross reference name spellings with invite list		
E-mail or call those invitees who have not responded		
Submit Guest list, final table guests with bio information and seating diagram to VIP's		
Copy handouts		
Finalize guest list and send to VIPs for review		
Prepare packets		
Finalize seating chart		
Send reminder email to attendees/call RSVP list		
Handle any last minute RSVPs		
Inform Security of number/type of guests and attendees, including media		
<b>Day-of Logistics</b>	<b>Staff Assignment</b>	<b>Completion Date</b>
<b>Supplies &amp; Materials</b>		
Reserved signs		
Talking points		
Guest List - Alphabetical by last name and another list by table #		
Table diagram		
Event scenario		
Nametags		
Programs		
Staffing flow		
Event supplies		
Backup computer		
Presentation		
Foam trays for nametags		
Gift/Favors		
<b>Event Flow</b>		
On-site Management - catering, AV, rentals, etc.		
Registration & guest Relations		
Program & speakers		
Clean-up		

# POSTING OF NOTICES AND ANNOUNCEMENTS

Updated: February 2018

The purpose of this policy is to: (1) assist the campus community in communicating news consistently via notices and announcements, (2) prevent damage to walls and surfaces of the facilities, and (3) maintain an aesthetically pleasing environment for faculty, staff, students and guests.

This Policy applies to all interior and exterior walls and surfaces at California Western School of Law in all campus buildings.

### 1. Approved notices.

- i. **Using Tape.** Notices may only be affixed to vertical surfaces using low-to-medium-adhesion rated painter's grade masking tape (commonly referred to as "blue tape", or "painter's tape"). These tapes are typically blue or green colored.

**Other tapes such as adhesive tape (commonly referred to as "Scotch tape"), packing tape, or masking tape are not permitted.**

- ii. **Using Notebars.** Approved notices may be mounted on 6" silver notebars provided at each classroom entrance. In some cases the note bars are part of the room's identifying sign (see *Picture 1*); in others the notebar is independently mounted.

Notes are mounted by pushing **up** into the notebar, and removed by pulling **sideways**. See *Picture 1*.

- iii. **Easels and Lobby Notices.** Notices to be posted in the 350 Cedar Street 1<sup>st</sup> and 2<sup>nd</sup> floor lobbies may be posted on easels, only. Easels are available in the Facilities Management office on the Mezzanine, and are on a first-come, first-served basis with limited availability.

Posted notices on easels for the 1<sup>st</sup> floor must be pre-approved by the Student Services department; notices on the 2<sup>nd</sup> floor do not need a pre-approval.



PICTURE 1

- iv. **Bulletin and Notice Boards.** Bulletin/notice boards are assigned as noted in the below chart.

<b>Building/Location</b>	<b>Purpose</b>	<b>Restriction: Notices can only be posted by...</b>
<b>225 Cedar Street</b>		
3 <sup>rd</sup> Floor Faculty Lounge, south wall	Notices for Faculty review	Faculty or Faculty Support
1 <sup>st</sup> floor Staff Lounge, west wall	Notices for Staff review	Human Resources, Planning Activities Cte (PAC)
1 <sup>st</sup> floor lobby by Business Office	Notices for students regarding Financial Aid/Bus. Office	Financial Aid or Business Office
Mailroom, north wall	Required Employment Notices	Human Resources
Mailroom, north wall	Mailroom notices such as delivery times	Mailroom
Mailroom, east wall	Safety notices for employees	Human Resources
Student Services, south cubicle wall	Various student and diversity information	Student & Diversity Services
<b>290 Cedar Street</b>		
Entryway circular column	Various library information	Library
1 <sup>st</sup> floor off lobby	Book jacket display	Library
2 <sup>nd</sup> Floor Mailroom, east wall	Required Employment Notices and other Library employee information	Human Resources, Library
2 <sup>nd</sup> Floor, near mailboxes	Personal	Library
Reserve room by copier	Library employee information	Library
Computer lab, north wall	Lab/computer/network info for students	Library
Copier rooms, each floor	Library info for students	Library
<b>350 Cedar Street</b>		
Lower level Student Lounge, north wall	Any notice permitted	Students
Lower level Student Org. suite, east wall	Any notice permitted	Students
Lower level Student Kitchen	Any notice permitted	Students
Lower level hallway at Student Org. door	Any notice permitted	Students
1 <sup>st</sup> floor by elevator	Student events and alerts	Facilities, Academic Support (Vice Dean, Student Services)
1 <sup>st</sup> floor next to Seminar Room	Innocence Project notices	Innocence Project
1 <sup>st</sup> floor between restrooms	(2) displays CWSL media/news notices	Student & Diversity Services
2 <sup>nd</sup> floor by restrooms, west wall	All student and class notices	Academic Support (Vice Dean, Student & Diversity Services)
2 <sup>nd</sup> floor by patio, south wall	All student organization notices	Students

2 <sup>nd</sup> floor by elevator, east wall (1)	Academic Achievement notices	Academic Achievement
2 <sup>nd</sup> floor by elevator, east wall (2)	Student/Diversity Services notices	Student/Diversity Services
2 <sup>nd</sup> floor Tanaka Gallery, north	Housing notices, Career & Professional Development Office notices	Admissions, CPDO
2 <sup>nd</sup> floor Tanaka Gallery, south	Career & Professional Development Office notices	CPDO
2 <sup>nd</sup> floor Tanaka Gallery, next to Alumni suite door	Alumni/Fundraising notices	Alumni
2 <sup>nd</sup> floor, outside CPDO's office	Career & Professional Development Office notices	CPDO
2 <sup>nd</sup> floor, east hallway	Moot Court Honors Board notices	Moot Court Honors Board

v. **Brochures, Handouts.** Brochures and handouts for mission-related information from departments and clinics may be distributed only via controlled procedures such as dedicated displays, inserts into student presentation folders, or handouts in class.

2. **Communication Methods.**

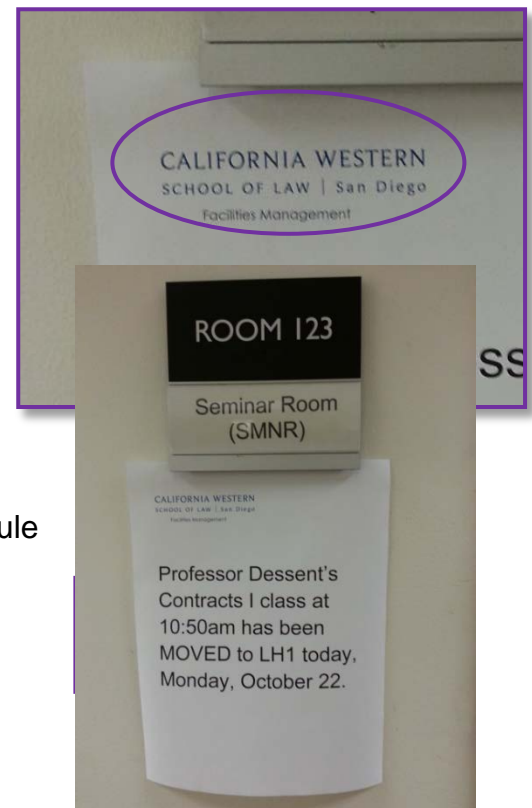
i. **Announcements.** Posters announcing campus events should indicate:

- the name of the sponsoring organization or group,
- the nature of the event,
- the date and time,
- the location,
- the cost (if any), and
- a contact number for more information.

ii. **Classroom Notices.** Notices indicating schedule changes should indicate:

- the school branding logo to indicate it is a school notice,
- the name of the responsible department,
- the date and time of the change,
- the specific change details.

See *Picture 2*.



**PICTURE 2**

3. **Unapproved Notices.**

i. **Posting.** Notices, banners, signs or announcements may not be posted by any means on any vertical or horizontal surface including walls, wood surfaces, classroom chalk and wipe boards, lockers, windows, doors,



restroom stalls, tables, chairs, hanging from ceilings, or any area other than designated notice boards as listed in the below chart, unless pre-approved by the Facilities Management department.

No notices, banners, signs or announcements are permitted to be hung by any type of line, string, or cable, without the advanced approval of the Facilities Management department.

- ii. **Mention of Alcohol.** At no time shall announcements, notices, or signs reference the service of alcohol (ex. “wine and cheese party”). For details, please see the campus *Room Booking Policy, Use Policies*.
  - iii. **Flyers.** Mass-produced flyers are prohibited from distribution in classrooms and campus common areas.
  - iv. **Exceptions.** Urgent notices such as classroom schedule changes do not require pre-approval.
  - v. **Chalking.** No chalking is permitted on walkways, walls, or anywhere on CWSL property or facilities.
4. **Artwall.** The “artwall” in the 350 Cedar Street lobby is available on a limited basis and only upon approval by the office of the Asst. Dean for Institutional Advancement. This area is used for limited purposes, only.

## Appendix K

# SOCIAL MEDIA GUIDELINES FOR STUDENT ORGANIZATIONS

California Western School of Law  
Social Media Guidelines for Student Organizations

Approved by Cabinet: January 28, 2014

---

### Purpose of Guidelines

The purpose of this document is to provide appropriate best practices for California Western student organizations with social media channels in order to maintain a professional online presence for the law school and to protect the reputation of the law school.

Individuals posting on behalf of the law school and/or a student organization are expected to adhere to the policies and best practices included in this document and appendices, including:

- Notify the law school: Send your social media URL/handle to the Director of Marketing and Communications, at [SocialMedia@cwsl.edu](mailto:SocialMedia@cwsl.edu).
- Each social media account must have at least one responsible administrator assigned. Those who leave the law school should immediately have their user/administrator credentials revoked.
- Before opening an official CWSL organization social media account, a plan should be developed that includes the account's audiences and goals; as well as a strategy for keeping information on the site(s) up-to-date.
- Logins and passwords for each social media account should be kept on file by the organization administering the account.
- Students identified as administrators of accounts are trusted to manage and monitor content of their officially recognized accounts. Administrators are responsible to remove content that may violate law school policies.
- Accounts must include a disclaimer statement regarding posted content and opinions contained on the site.
- Inappropriate, offensive, injurious, and illegal content shall not be posted to organizational social media accounts. Violations of these guidelines will be referred to the Vice Dean for Academic Affairs for resolution.
- Best practices for social media, as outlined in Appendix L of this document, should be followed.

### Scope of Policy

This policy covers all school-sanctioned student clubs and organizations at California Western School of Law.

### What forums are covered?

This policy applies to all official social media presences for California Western student organizations including, but not limited to:

- Facebook
- YouTube
- Twitter
- Instagram
- LinkedIn
- Blogs
- Podcasts

### Social Media Guidelines

All members of the law school community are trusted to respect and protect the image and reputation of the institution as they participate in social media channels as representatives of the school.

- Protect confidential and proprietary information: Do not post confidential or proprietary information about California Western School of Law, its students, faculty, staff, administrators, or alumni.
- Respect copyright and fair use: **Do not use material from any other source without permission.** See Appendix M, “Using Images Created by Others.”
- Do not use California Western logos or resources for endorsements: Do not use the law school’s name or resources to promote a product, cause, or political party or candidate.
- Do not use the California Western nameplate, seal, or any other law school images or iconography on personal social media sites.
- Abide by policies and procedures: California Western does not monitor personal websites but will address issues that violate related and established policies and procedures.
- Terms of service: Obey the Terms of Service of any social media platform employed.

When posting, acknowledge who you are: If you are representing California Western when posting on a social media platform, acknowledge this. If you are expressing your own personal opinions, state this as well.

Protect the institutional voice: Posts on social media sites should reflect the law school’s mission and values by remaining professional in tone and in good taste.

## Appendix L

# SOCIAL MEDIA BEST PRACTICES

---

**Practical Application of the Policy:** This section applies to those posting on behalf of the law school, a program or department, though the guidelines may be helpful for anyone posting on social media in any capacity.

- *Consider how best to identify yourself:* Program or department social media channels should be clearly labeled as such, so as not to be confused with the law school's main social media channels. The Director of Marketing and Communications is available to assist with naming, photos, or icons.
- *Think twice before posting:* Posts can become widely known. Think through how your choice of words reflects on you and the law school. Search engines can turn up posts years after they are created and deleted, and comments can be forwarded or copied. If you wouldn't say it publicly, consider whether you should post it online.
- *Be accurate:* Verify facts before posting them on social media or online. Review content for grammatical and spelling errors if posting on behalf of the law school in any capacity.
- *Be respectful:* Understand that content contributed to a social media site could encourage comments or discussion of opposing ideas. Responses should be considered carefully in light of how they would reflect on the poster and/or the law school and its institutional voice.
- *Use discretion:* Refrain from reporting, speculating, discussing, or giving any opinions on law school topics or personalities that could be considered sensitive, confidential, or disparaging.
- *Remember your audience:* Be aware that a presence in the social media world is available to the public at large including internal audiences, prospective students, peer institutions, and colleagues. Ensure the post will not alienate, harm, or provoke any groups or individuals.
- *On personal sites, identify your views as your own.* If you identify yourself as a member of the California Western faculty or staff online, it should be clear that the views expressed are *not* those of the institution. If you have information and news that you would like to announce to the public or media, please contact the Director of Marketing and Communications.

## Appendix M



# USING IMAGES CREATED BY OTHERS (rev. 7/15)

As a general rule, you may not use graphic images found on the Internet in your own work even if the image does not say it is copyrighted.

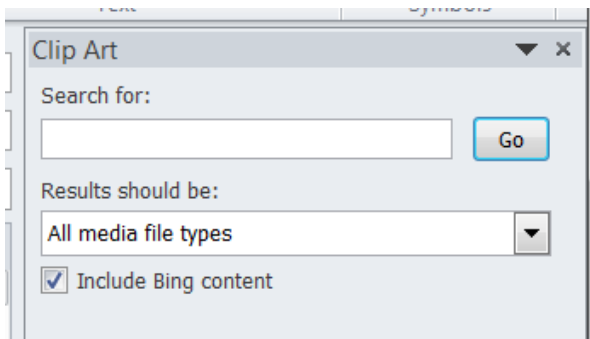
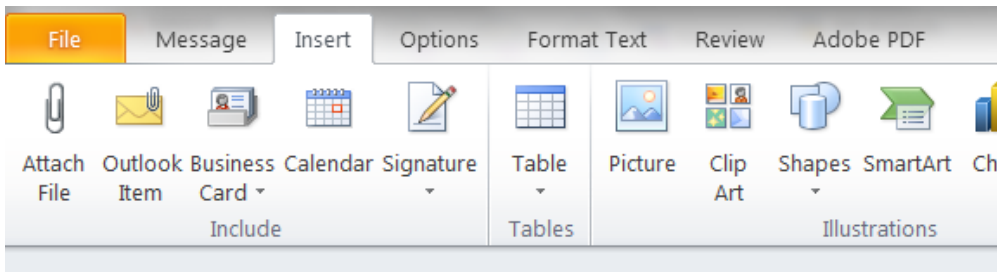
Exceptions:

1. Image says it is in the public domain.
2. Source of the image clearly states that image may be used by others.

Where can you get images to use without violating copyright law?

### A. Microsoft Office clip art

Up until 2015, your Microsoft Office license allowed you to use anything in the Microsoft clip art file. Beginning in 2015, Microsoft phased out its clip art files, instead, its clip art function directs users to Bing images.



Microsoft indicates that its Bing Image Search uses a copyright filter based on the Creative Commons licensing system retrieving only images that have been tagged with Creative Commons licenses. Unfortunately, Creative Commons licensing does

not mean that an image is copyright free – it just means that you may use the image if you follow rules for the Creative Commons license for the image.

If you do the search including Bing content, the images you bring up may or may not have a link to the source of the image. You should follow the link to the source and review the applicable license to determine whether your use will comply with the license. If you are using the image non-commercially, in most cases you will be able to use the image as long as you give attribution. Unfortunately, there has been some Internet discussion that there are missing and broken links on the images retrieved, so the system is less than perfect. The images you find using this approach should be fine for internal uses, such as an email, internal presentations, and temporary non-digital posters, but should not be used for items which may find their way on to our web site as digital files. (These items can be retrieved by searching and could lead to infringement actions.)

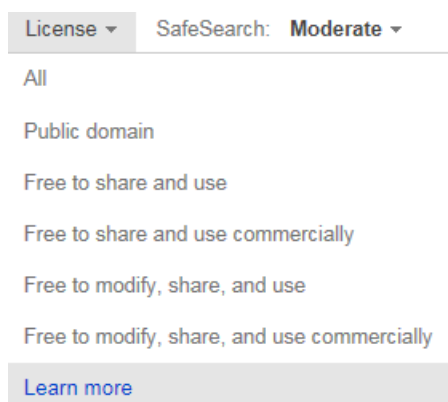
## Bing.com

Instead of getting Bing clip art through Microsoft applications, you can go directly to Bing.com to recover images that Bing says are either in the public domain or under Creative Commons licenses. There is some disagreement over Bing’s diligence in determining the licensing of images, but you are probably safe with using the images, particularly if you give attribution.

1. Go to Bing.com.
2. Click **Images** at top of page.
3. In the search box type what you are looking for. If you specifically want clip art, type “clip art” as part of your search. For example:



4. Enter.
5. Click on License drop down menu.



6. The safest license is “Public Domain”; the largest subset is “Free to share and use”.



7. If you hover your cursor over the image, it may indicate a source. If it does, give attribution to Bing.com, with the source.



600 x 600 • jpeg • freestock.ca

Attribution on your use: Bing.com: freestock.ca

If there is no attribution on the image, the attribution on your use would be Bing.com.

Caveat: the images under the public domain licenses included some images with popular cartoon characters such as Snoopy and Mickie Mouse. Since I am highly skeptical that these are actually in the public domain, I would suggest you refrain from using these.

## B. Public domain sources:

- a) [www.pdclipart.org](http://www.pdclipart.org)



- b) [www.openclipart.org](http://www.openclipart.org)



- c) <http://classroomclipart.com/clipart/Clipart/Legal.htm>

## Classroom Clipart

Classroom Clipart: Source for Free Legal Pictures, Graphics Illustrations and Clip Art

- d) <http://www.dreamstime.com/>

Download Royalty-Free stock photos, illustrations & images for as low as \$0.20 / image or free. DREAMSTIME offers both free and royalty free (slight cost) images. You need to sign up for the free service and make sure that you follow the tabs to the free images section.

“License: Royalty- Free License of use of Non-Watermarked Images and Restrictions”

The high-resolution images that you download under the regular Royalty Free (RF) license may be used to make fine art prints, on a web site, in a magazine, newspaper, book or booklet, book cover, flyer, application software (apps) or any other advertising and promotional material, in either printed or electronic media, as long as the item in which the image appears does not contradict any of the restrictions below....

[Excluded uses]: Web templates, greeting cards or postcards especially designed for sale, similar print-on-demand services, canvas, t-shirts, mugs, calendars, postcards, mouse pads or any other items incorporating the image in an essential manner, intended to be sold are considered redistribution (if the image is used in an essential manner)....

Buying the high-resolution image (purchasing the license) does not transfer the copyright. You may not claim that the image is your own and you may not sell, license for use, or in any way distribute the image for reuse. We recommend that you credit the agency and the photographer when you use an image. By this you benefit the community at Dreamstime.com, of which you are an integral part, and help increase your success as part of the community, which, by growing contributions, gains quantity and quality.”

There is one additional restriction for images from the “free” section of the service: the maximum amount of copies is limited to 10,000 copies.

- e) [http://commons.wikimedia.org/wiki/Main\\_Page](http://commons.wikimedia.org/wiki/Main_Page)

Wikimedia Commons a database of over 16,000,000 freely usable media files. It’s a rather dense databases, but includes a great many images (and sounds and videos) and it tells you why each particular image is in the public domain.



## If you can't find a public domain graphic image that meets your needs:

1. Get permission or a license. If you find a graphic you'd like to use, contact whoever holds the copyright to the graphic to ask for permission. They may be happy to give permission (or license) its use, but they may want to charge a fee for the use.
  - a. The copyright holder may or may not be clear. BE AWARE that it is somewhat probable that it won't be the site where you found the graphic. The site may be using the image with permission or without permission.
  - b. If you get permission or a license to use an image, with or without payment, please get the permission IN WRITING AND FORWARD A COPY OF THE PERMISSION to Phyllis Marion so we have a record that permission has been granted.
2. Purchase an individual image. It is possible to purchase (for a relatively small fee) individual images that are royalty free from one of several sites that are in the business of selling stock images. The site may ask you to set up an account or a subscription. Possible sites include:

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

<http://www.fotosearch.com/clip-art/law.html>

<http://us.fotolia.com/>

<http://www.dreamstime.com/>

3. Purchase clip art software. If your department is a heavy user of graphics, there are several inexpensive clip art software packages available for purchase. Make sure to check with IT about whether the package is compatible with CWSL technology. Below is a site which reviews clip art packages. (It is only up to date through April 2011.) The site also has links to various sources of images that are royalty-free (but with a small fee for use).

<http://clip-art-review.toptenreviews.com/>

Phyllis Marion Rev. 7/30/15

# Appendix N

## **STUDENT ORGANIZATION ADVANCE REQUEST [SOAR] FORM**

**This form is for event expenses over \$100.00**

Use this form to request advance funds for your event.

Please note that the process to receive funds may take up to 21 business days.

1. Name: \_\_\_\_\_ 2. Email: \_\_\_\_\_

3. Organization (Full Name): \_\_\_\_\_

4. Event : \_\_\_\_\_ 5. Event Date: \_\_\_\_\_

6. Reason for advance (business purpose): \_\_\_\_\_  
\_\_\_\_\_

7. Amount Requested: \$ \_\_\_\_\_ 8. Source of Funding [ ] SBA \_\_\_\_\_

[ ] Dues

### TERMS OF ADVANCE:

Students who have been approved for an advance are required to submit original, detailed receipts as proof for all expenses incurred. The expense receipts plus any unused cash must be returned to the Business Office within **14 business days** of receiving the advance payment. Failure to submit the required documentation and/or return of any unused cash by the deadline may result in the following actions:

- If proper reimbursement documents (form & receipts) are not received, amount may be reported as compensation to the Internal Revenue Service (IRS) as compensation. Please note: amounts reported to the IRS as compensation may have a negative effect on any future requests for federal financial aid.
- Student may have a Business Office hold placed on account.
- Student Organization may be prohibited from further reimbursements during the trimester.
- Student Organization may be prohibited from seeking SBA funds the following trimester.
- In rare cases, an Honor Code violation may result.

I acknowledge that I have read and understand the terms of the advance detailed above.

Signature: \_\_\_\_\_ Date Submitted: \_\_\_\_\_

Request Authorized By Student Organization: [ ] President or [ ] Treasurer

\_\_\_\_\_  
Date: \_\_\_\_\_

Funds Verified by SBA Treasurer:

\_\_\_\_\_  
Date: \_\_\_\_\_

Request Approved by Asst. Dean for Student & Diversity Services:

\_\_\_\_\_  
Date: \_\_\_\_\_

# Appendix O

## STUDENT ORGANIZATION ADVANCE REPORTING FORM

		<i>Business Office use only:</i>		Date received: _____	Vendor # _____
				Co. # _____	Sch.F? (circle one): Y / N
<b>CALIFORNIA WESTERN SCHOOL OF LAW STUDENT ORGANIZATION ADVANCE REPORTING</b>					
<small>Use this form to account for all expenses paid from advanced funds received. Attach original itemized receipts and paid invoices.</small>					
STUDENT NAME:				AMOUNT OF ADVANCE:	
ORGANIZATION:				EVENT NAME:	
Report of Reimbursable Expenses Incurred:					
Date	Vendor	Amount	<b>SBA Treasurer Use Only:</b> Event Account Code: _____		
Total:		0	Difference from Advance: \$0.00		
Business Purpose (please be specific):					
I certify that the above is a true statement of incurred expenses in accordance with CW/SL policy:					
Student Signature					
Authorized approval:					
Date:					

# Appendix P

## STUDENT ORGANIZATION REIMBURSEMENT FORM

Please submit completed form to the SBA Treasurer's LOCKBOX in the Student Org Room, Cubicle #1.

REIMBURSEMENTS MUST BE SUBMITTED WITHIN 30 DAYS OF EVENT.

If you have questions please email [SBATreas@law.cwsl.edu](mailto:SBATreas@law.cwsl.edu).

1. Organization (Full Name): \_\_\_\_\_
2. Event Name: \_\_\_\_\_
3. Event Date: \_\_\_\_\_
4. Provide a brief explanation of the event, including its business purpose: \_\_\_\_\_  
\_\_\_\_\_
5. Total Amount Requested: \$ \_\_\_\_\_
6. Reimburse from Dues Account Only?  Y  N
7. Payable To: \_\_\_\_\_  
(Legal Name)
8. Payee's email: \_\_\_\_\_
9. Delivery Instructions:  Hold for Pickup  Mail To: \_\_\_\_\_
10. Please include each of the following: A.  Attendance Roster **AND** B.  Itemized Receipt/Online Paid Invoice\*

**\*If you are missing 10B please attach both:**  Missing Receipt Form **AND**  Proof of Payment<sup>1</sup>

11. Request Authorized By (cannot be person getting reimbursed):

Name: \_\_\_\_\_ Position:  President  Treasurer

Email: \_\_\_\_\_

Signature: \_\_\_\_\_ Date Submitted: \_\_\_\_\_

### SBA TREASURER USE ONLY

Pay funds from:

SBA Budget Amount: \$ \_\_\_\_\_ Account Code: \_\_\_\_\_

SBA Budget Amount: \$ \_\_\_\_\_ Account Code: \_\_\_\_\_

Dues Amount: \$ \_\_\_\_\_

Approved By: \_\_\_\_\_ Date Approved: \_\_\_\_\_

Student Services – Event Approved : YES NO N/A Date Approved: \_\_\_\_\_

Request Reviewed By: \_\_\_\_\_ Date Reviewed: \_\_\_\_\_

Request Approved By: \_\_\_\_\_ Date Approved: \_\_\_\_\_

Business Office – Received By: \_\_\_\_\_ Date Received: \_\_\_\_\_

<sup>1</sup>Proof of payment in the form of banking statement transaction entry. Provide also if receipt does not show cc authorization.

Rev. 7/26/2018

# Appendix Q

## STUDENT ORGANIZATION VENDOR CHECK REQUEST FORM

**\*\*THIS FORM SHOULD BE USED WHEN MAKING A DIRECT PAYMENT TO A SUPPLIER OF GOODS AND/OR SERVICES \*\***

Please submit completed form to the SBA Treasurer's LOCKBOX in the Student Org Room, Cubicle #1.

If you have questions please contact [SBATreas@law.cwsl.edu](mailto:SBATreas@law.cwsl.edu).

1. Payable To (Business or Vendor Name): \_\_\_\_\_

2. Address: \_\_\_\_\_

3. Phone Number: \_\_\_\_\_ 4. Payee's Email: \_\_\_\_\_

5. New Payee?  YES (include W-9 form)  NO 6. Amount: \$ \_\_\_\_\_

**\*Include invoice**

7. Business Purpose: \_\_\_\_\_  
\_\_\_\_\_

8. Delivery Instructions:  Hold for Pickup  Mail with invoice

9. Request Authorized By:

Name: \_\_\_\_\_ Position:  President  Treasurer

Organization: \_\_\_\_\_

Signature: \_\_\_\_\_ E-mail: \_\_\_\_\_

Date Submitted: \_\_\_\_\_

### SBA TREASURER USE ONLY

Pay funds from:

SBA Budget Amount: \$ \_\_\_\_\_ Account Code: \_\_\_\_\_

SBA Budget Amount: \$ \_\_\_\_\_ Account Code: \_\_\_\_\_

SBA Budget Amount: \$ \_\_\_\_\_ Account Code: \_\_\_\_\_

Dues Amount: \$ \_\_\_\_\_

Approved By: \_\_\_\_\_ Date Approved: \_\_\_\_\_

Student Services – Event Approved : YES NO N/A Date Approved: \_\_\_\_\_

Request Reviewed By: \_\_\_\_\_ Date Reviewed: \_\_\_\_\_

Request Approved By: \_\_\_\_\_ Date Approved: \_\_\_\_\_

Business Office – Received By: \_\_\_\_\_ Date Received: \_\_\_\_\_

# Appendix R

## SAMPLE OF ITEMIZED RECEIPT

### RECEIPT WITH PAYMENT

Beer Co  
602 Broadway  
San Diego, CA 92101  
619-398-0707

Server: Heather DOB: 10/24/2013  
07:03 PM 10/24/2013  
Table 100/2 2/20008

SALE

Visa #XXXXXXXXXXXX9830  
Magnetic card present:  
Card Entry Method: S

Approval: 050422

Amount: \$ 24.05  
+ Included Gratuity: \$ 4.01  
+ Additional Tip \$6.00  
= Total: \$34.06

I agree to pay the above total amount according to the card issuer agreement.

X \_\_\_\_\_

\*\*Guest Copy\*\*

### ITEMIZED RECEIPT

Beer Co  
602 Broadway  
San Diego, CA 92101  
619-398-0707

Server: Heather 10/24/2013  
Table 100/2 6:57 PM  
Guests: 24 20008  
Reprint #: 1

Guacamole & Chips 5.00  
Ahi Tower 7.00  
Mozzarella Sticks (2 @5.00) 10.00  
Pretzel Sticks (2 @5.00) 10.00  
Garlic Bread 4.95  
Pepperoni Pizza 5.50  
Endless Summer Veggie 5.50  
Chicken Nachos 6.00  
Chicken Lettuce Wraps 7.00  
Chicken Nachos NO Chicken 6.00

Subtotal 66.95  
Tax 5.19

Total 72.14  
Gratuity 18.00% 12.05  
Total 84.19

Balance Due 84.19

\*\*\*\*\*  
Gratuity Calculator:  
20% = \$16.39  
15% = \$12.04

HAPPY HOUR 7:00pm - 7:00pm  
LATE NIGHT HAPPY HOUR 7pm - close

**TO RECEIVE REIMBURSEMENT – BOTH COPIES ARE NECESSARY.**

## Appendix S

# STUDENT ORGANIZATION MISSING RECEIPT FORM

<b>CALIFORNIA WESTERN SCHOOL OF LAW</b> <b>STUDENT ORGANIZATION MISSING RECEIPT FORM</b>	
STUDENT NAME _____	ORGANIZATION _____
AMOUNT \$ _____	PAYEE/VENDOR _____
EVENT NAME _____	
<b>Business Purpose of event</b> (as described on Reimbursement Request Form): _____ _____ _____	
<i>I certify that the amount shown above is the amount I actually paid and that I will not submit a duplicative claim for this amount.</i>	
Student Signature _____	Date: _____
Authorized approval: _____ <small>Assistant Dean for Student &amp; Diversity Services</small>	Date: _____
If you are missing any single receipt that is \$75.00 or greater, then you must also have approval by CWSL Chief Financial Officer.	
Authorized approval: _____ <small>Chief Financial Officer</small>	Date: _____

**Appendix T**  
**STUDENT ORGANIZATION TRAVEL ADVANCE  
ACKNOWLEDGEMENT FORM**

Student Name:

\_\_\_\_\_

Student Organization:

\_\_\_\_\_

Reason for Advance:

\_\_\_\_\_

Advance Amount: \$ \_\_\_\_\_

*Terms of the Travel Advance:*

Students who have been approved for travel advances are required to submit original, detailed receipts as substantiation for all expenses incurred. The expense substantiation plus any unused cash must be returned to the Business Office within two weeks of the date of the event. Failure to submit the required documentation and/or return of any unused cash in a timely manner (within two weeks of the date of the event) will result in the reporting of the amounts to the Internal Revenue Service as compensation.

By accepting this travel advance, I acknowledge that I have read and understand the terms of the travel advance detailed above.

\_\_\_\_\_

Student Signature

\_\_\_\_\_

Date

\_\_\_\_\_

SBA Treasurer

\_\_\_\_\_

Date

\_\_\_\_\_

Assistant Dean for Students & Diversity Services

\_\_\_\_\_

Date



## Appendix U

# STUDENT ORGANIZATION EVENT APPROVAL FORM

**THIS FORM IS REQUIRED FOR ALL EVENTS**

Please note that the approval process may take up to 48-hours.

Organization Name:  [select from drop down list]

### TYPE OF EVENT

- CONFERENCE/SYMPOSIUM (start 6 months prior)
- FUNDRAISING (Bake Sales)
- FUNDRAISING (Non-Bake Sales: Auctions, Luau, etc.)  
\*Start 6 months prior
- GENERAL MEETING
- MOVIE SCREENING  
\*Please note that written permission is required from the licensing agent unless the film is in the public domain.
- NETWORKING/MIXER  
\*Please note that a certificate of insurance is required if this event is on campus and you are serving alcohol.
- PHILANTHROPY (Community Services)
- PHILANTHROPY (Donation Bins)
- SPEAKER(S)/PANEL DISCUSSIONS
- TABLING (Event Info/Sign Ups/Ticket Sales)
- OTHER

### EVENT INFORMATION

Name of Event:

Proposed Date of Event:

Proposed Time of Event (start & end):

Detailed description of the event, including its business purpose:

Anticipated Attendance:

Event Budget:

Contact Person Name:

Contact Person Email:  (valid email required)

Contact Person Position:

<input type="text" value="One"/>	<input type="text" value="Please"/>	<input type="text" value="Please"/>	<input type="text" value="yyy"/>	<input type="text" value="nn"/>
----------------------------------	-------------------------------------	-------------------------------------	----------------------------------	---------------------------------