

## **SYNERGY**

### Student Leader Handbook 2023-2024

This handbook was originally developed back in 1981 in response to a need by student leaders to have a resource book that would assist them in their roles as student leaders. The name Synergy came from the 1980 Leadership Workshop, where attendees defined Synergy as, “the sum of its parts is greater than the whole.” For many student leaders, this easily translates to everyone in an organization working together to achieve the same goal. Many times, the combined efforts of all those involved is far greater than all members working separately. And that’s how the title of this handbook came to be.

Synergy was designed to assist student leaders in their roles with student organizations. Its main purpose is to serve as a resource manual and help you better understand the policies and procedures that must be followed in order to provide effective programs and services for all Worcester State students. A secondary purpose of Synergy is to provide helpful hints on how to improve your organization and outline what role the Office of Student Involvement & Leadership Development (OSILD) plays in relation to student organizations.

Synergy is meant to be referred to throughout the year, so make sure to keep a copy handy for all of your members. You can also find additional information on **[worcester.edu/campus-life/clubs-organizations](https://www.worcester.edu/campus-life/clubs-organizations)**. If you have additional questions, do not hesitate to contact the OSILD; no handbook can contain all the information needed, and we are here to help you succeed in your role as a Worcester State student leader. Have a great year!

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## **OFFICE OF STUDENT INVOLVEMENT & LEADERSHIP DEVELOPMENT**

### **Mission**

The Office of Student Involvement and Leadership Development provides a comprehensive co-curricular student experience through leadership development, involvement opportunities, and a diverse array of social, cultural, and educational programs for the entire Worcester State community. All of our programs challenge and encourage students to become empowered, inclusive, and knowledgeable future community and global leaders.

### **Vision Statement**

To be the primary campus resource in student leadership development programs and known for providing immersive campus experiences that allow students to build their interpersonal abilities and develop real-world skills.

### **Core Values**

The work of the Office of Student Involvement and Leadership Development is guided by the following values:

- Student Development and learning happens both in and out of the classroom, and programs seek to help students make connections between their academics and real-world applications
- Empowering students to be resilient and teach them how to advocate for themselves and those around them through programs and trainings
- Leadership is accessible to all students, and only through shared experiences can students learn to both improve their leadership style and appreciate those of others
- Mutual Respect of all students, staff, faculty, and community members is key in establishing an environment of inclusiveness, understanding, and the sharing of ideas

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## **ADDITIONAL RESOURCES**

### **Companion Guides**

- Synergy: Steps to Starting a New Club Sport
- Synergy: Steps to Starting a New Student Organization
- Student Organization Advisor Manual

### **Companion Handouts**

Companion handouts can be provided by your Program Coordinator or picked up in the Resource Room.

- Budget Packet Sample & Tips
- Event Evaluation Form
- Meeting and Event Room Locations and Capacities
- Programming Timeline Checklist
- Student Organization Elections
- Student Organization Meetings
- Tips for Student Leaders
- Trip Checklist for Advisors
- Trip Timeline Checklist

## TERMS TO KNOW

### **Advisor**

Your Advisor is a full-time staff/faculty member who provides guidance and support to your organization.

### **Budgeting Workshop**

All Treasurers are required to attend a Budgeting Workshop, where they will learn about policies and procedures related to organization finances.

### **CESO**

The Conference and Event Services Office (CESO) includes professional and student staff who help support campus events. They provide setup and breakdown help as well as technical assistance.

### **Club Sport Team**

A Club Sport Team is a competitive athletic team that competes with other schools throughout the year at a non-varsity level.

### **ELC**

Executive Leadership Council is held four to six times a semester, and is an opportunity for members of all recognized organizations to meet and discuss upcoming events.

### **EPT**

Event Planning Training (EPT) is required for all student organization members who wish to be a part of the event planning process and become a Student Coordinator. It is held multiple times throughout the year.

### **Key List**

A key list is a list of members who have access to the key(s) for your organization's office and/or closet in the Student Org Suite.

### **Major Organization**

A Major Organization is an organization that has existed for over two years, and whose purpose and activities appeal to a large number of students.

### **Org Suite**

Located on the third floor of the Student Center, the Student Organization

Suite is the home of a large work room, conference room, organization offices, and storage closets. The conference room can be booked with your Program Coordinator, and the large work room is available for your use throughout the day.

## **OSILD**

The Office of Student Involvement and Leadership Development (OSILD) is located on the second floor of the Student Center, and is where you can find your Program Coordinator's office, Wall of Forms, and organization mailboxes.

## **Planning Calendar**

The Planning Calendar provides an overview of all events for the upcoming year. It is a great resource for choosing dates and locations for your events. A copy can be picked up in the OSILD.

## **Program Coordinator**

Your Program Coordinator is a staff member in the OSILD, and is available to meet with you throughout the year and help with event planning and address any questions that you may have.

## **Resource Room**

Located on the first floor of the Student Center, the Student Organization Resource Room is available for student organizations to make flyers, posters, and banners, as well as make quick copies. There are also limited arts and craft supplies for members to use for publicity and a resource library for student leaders.

## **SATF**

The Student Activities Trust Fund (SATF) is account that houses the student activities fees, paid by students each year. Individual organization budgets are created using funds from the SATF.

## **Special Interest Group**

A Special Interest Group is an organization whose purpose and activities appeal to a limited number of students. All groups must be a Special Interest Group before becoming a Major Organization.

## **Wall of Forms**

Located within the OSILD, the Wall of Forms is where you can find any

forms that you need to complete for organization-related reasons.

## EVENTS TO KNOW

**All Org Banquet**—This banquet is held at the end of the spring semester in appreciation to all student organizations for a great year of programming. Each organization is also able to recognize their own members through awards and gifts. The Outstanding Student Leader Award is also given out at this banquet.

**Chandler's Challenge**—Chandler's Challenge is Worcester State's annual days of giving. In this exciting two-day bracketed-style event, official student clubs, academic departments and centers, and athletic teams will go head-to-head to see who can get the most donors to support their cause. Winning teams will be awarded cash prizes.

**Club Kick Off**—Held at the beginning of the fall semester, the Club Kickoff is a large fair where students can learn about all the available organizations and clubs can recruit new members. Student organizations receive sign up information in August.

**Emerge Leadership Program**—The Emerge Leadership program is designed for any emerging leader regardless of their class year. Emerge is a seven-week workshop program held each semester to help students build their foundational leadership skills while developing a personal leadership philosophy.

**Family Day**—Held in the fall semester, Family Day provides a day of programs for students and their families. Student organizations are encouraged to participate in the events.

**Fresh Check Day®**—Fresh Check Day is an uplifting mental health fair that includes peer-run interactive booths, free food, music, and exciting prizes and giveaways. Fresh Check Day is coordinated by Counseling Services.

**Homecoming**—Held in the fall semester, Alumni and family members are invited on to campus to enjoy many programs such as Homecoming Football Game, Family Fun Activities, and more. All student organizations are encouraged to participate in the events.

**Leadership Summit**—The Leadership Summit, held in February, provides an immersive off-campus weekend program to students who wish to learn more about their own leadership styles and skills.

**Leadership Symposium**—The Leadership Symposium is an annual spring event that allows students to attend leadership-focused workshops held by staff, faculty, alum, and community members.

**SGA Elections**—The Student Government Association (SGA) holds elections each spring and fall. Encourage your students to participate in these elections.

**Welcome Week**—Events are planned during the first week of school to help welcome new students and welcome back returning students. Student organizations are encouraged to participate in the events.



## **ANNUAL CHECKLIST FOR STUDENT ORGANIZATIONS**

Below is a helpful task list to give you an overview of what student organizations should be doing throughout the year. Use this to help stay on track.

### **Weekly/Monthly Things To Do**

- Check club email account if you have one
- Check your own personal email for weekly leadership emails from our office.
- Check club mailbox in OSILD

### **August**

- Read the summer leadership newsletter to help you get ready for the upcoming year
- Publicize your club by making new general club banners and flyers to advertise first meeting
- Complete paperwork and forms for September events and turn into OSILD
- Sign up for Club Kick Off and prepare for table
- Develop a recruitment plan
- Check club mailbox for important information
- Finalize planning for Family Day/Homecoming if participating
- Determine any event date and/or space changes and speak with your Program Coordinator

### **September**

- Advisors and Officers - Nominate students for the fall Emerge Leadership program
- Sign up for and attend Student Leader Welcome Back event
- Complete Club Registration Form
- Special Interest Groups start the re-recognition process with Student Senate
- Attend/complete Budget and Event Planning Training (EPT) as needed
- Advisors – Attend Advisor Lunch
- Participate in Club Kick Off and Welcome Week activities
- Major Organizations – submit a key list for club offices and/or closet to OSILD if applicable
- Meet with Program Coordinator for initial semester meeting

- Complete paperwork and forms for October events and turn in to OSILD

### **September (continued)**

- Plan for and attend Family Weekend and Homecoming events
- Vote in the SGA Elections
- Designate a member of your organization, preferably the President/Chairperson, to attend the monthly Executive Leadership Council Meetings

### **October**

- Attend/complete Budget and Event Planning Training (EPT) as needed
- Complete paperwork and forms for November events and turn in to OSILD

### **November**

- Complete paperwork and forms for December events and turn in to OSILD
- Advisors and Officers - Nominate students for the spring Emerge Leadership program

### **December**

- Submit organization roster to OSILD for records
- Pay all bills before leaving for winter break
- Complete paperwork and forms for January and February events and turn in to the OSILD
- Sign up for the Leadership Summit

### **January**

- Meet with Program Coordinator to discuss space updates for spring semester
- Pay any bills that may have come in over the winter break
- Complete paperwork and forms for February events if not done already and turn in to the OSILD

### **February**

- Attend/complete Budget and Event Planning Training (EPT) as needed
- Major Organizations – Prepare budget for the Senate Budget Hearings and complete your budget packet
- Complete paperwork and forms for March events and turn in to OSILD
- Major Organizations – update key list if you have new members

## **February (continued)**

- Advisors and Officers – Nominate a deserving senior for the Ella May Whitney Award
- Last chance for your organization to be re-recognized for this academic year if you have not done so already (deadline is March 1st)
- Last chance for any additional allocations requests to be submitted to Senate (deadline is March 1st)

## **March**

- Major Organizations - turn in Budget Request to Senate.
- Hold elections for officers for the next academic year and submit submit list to OSILD
- Officer training for newly elected officers should begin
- Complete paperwork and forms for April events and turn in to OSILD
- Last chance for any line transfers for a Major Organization budgets (deadline is April 1st)
- Submit award packet for All Org Banquet
- Advisors and Officers - Nominate students for the Outstanding Student Leader Award

## **April**

- Submit organization roster to OSILD for records
- Submit club roster for All Org Banquet list and have members sign up at the OSILD desk
- Vote in the SGA Elections
- Submit Summer Contact List to OSILD
- Complete paperwork and forms for May events (if any) and turn in to OSILD

## **May**

- Attend All Org Banquet
- Major Organization Officers - Turn in keys to your club office/closet before leaving for summer
- Pay any bills remaining before leaving for summer
- Attend Planning Calendar Meeting to reserve dates and space for next academic year

## **I – STUDENT ORGANIZATIONS AT WORCESTER STATE**

### **STUDENT ORGANIZATION STRUCTURE**

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

If you are interested in starting a new student organization, please be sure to pick up a copy of the companion guide Synergy: Steps to Starting a New Student Organization. In order to start a new student organization, you must have a full executive board, three general members, an Advisor (full time faculty or staff), and a completed charter. Additional information and specific steps can be found in the guide mentioned above. Requests for new student organizations will not be accepted after December 1st. Meet with a member of the OSILD staff to get started. New student organizations must be recognized by Senate to participate in Club Kickoff.

#### **Re-Recognition for Special Interest Groups**

Each fall, Special Interest Groups are required to submit a request to Senate to be re-recognized and gain access to their budget for the upcoming year. Requests for re-recognition will not be accepted after March 1st without compelling circumstances.

In order to be re-recognized the following fall, the Executive Board must complete an updated Club Registration Form, which can be completed online. They must list all current Officers and Advisor(s). This request will then be submitted to the Senate Parliamentarian, who will review the request and present it to Senate for approval. Once recognized, the Special Interest Group will receive \$500 in funding for the academic year.

#### **Becoming a Major Organization**

Once a Special Interest Group has been recognized for four consecutive semesters, it may request a hearing by the Senate Procedural Committee to become a Major Organization.

First, the Special Interest Group must revise their Charter to include a broader mission. A new Registration Form should be completed, and a budget request developed. All three pieces (updated Charter, Registration Form, and budget) should be submitted to the OSILD, who will then submit it to the Senate Parliamentarian for review. The Senate Procedural Committee will either suggest changes or vote on the Charter. The Charter is then presented to Senate, who will vote on the recognition as a Major

Organization. A separate meeting will be held where members of the organization will meet with the Senate Treasurer for a Budget Hearing. Following this meeting, Senate will approve the new budget.

### **Defunct Student Organizations**

If a student organization is not recognized for two consecutive years, it shall be deemed defunct. If an organization wishes to reform following this two-year period, it must start again as a new group, and may only initially be recognized as a Special Interest Group. A student organization deemed defunct will surrender all remaining funds (from Line 99) to Senate after two years.

### **Organization Charter**

Each student organization has a Charter. The Charter is the document that outlines all of the governing policies of the organization, including the mission and purpose of the organization, roles and responsibilities of Officers, membership requirements, election details, and Advisor requirements. It is suggested that each new Executive Board reviews the Charter for updates and changes each year.

Charters are able to be revised at any point in time. Any organization that wishes to revise their Charter must submit their proposed Charter changes to the Senate Parliamentarian, along with a list of current Officers and Advisor(s). Once reviewed by the Parliamentarian, the Charter will be submitted to Senate for approval.

### **Executive Board/Officers**

In order for an organization to function effectively, it is important that each member understands their role within the organization. Below, you will find general descriptions of roles within student organizations. Your organization may have other roles not included, or specific requirements of roles that are listed below, and that's okay! Each group is able to create roles and responsibilities that they feel fit their goals and mission best.

In order to be eligible for an Executive Board position on a recognized student organization, a student must meet the following criteria:

- Full or part time matriculated Worcester State student
- Maintain a cumulative GPA of 2.0 or higher
- Not be on disciplinary probation
- May only be an Executive Board member of one Major Organization at a time

The roles listed below traditionally make up the Executive Board of the student organization, and are referred to as officers. The Charter should include updated information on all active Executive Board positions.

**Chairperson/President** – The Chairperson/President of an organization should be someone who has strong leadership qualities and is assertive and creative. This role is responsible for overseeing the general operation of the organization, from delegating tasks and developing the skills of members, to leading meetings and making objective decisions. They should be able to manage conflict, listen to the needs of members, and encourage new ideas. The Chairperson/President should be committed to their organization and feel confident leading a team.

**Vice President** – The Vice President of an organization exists to both support the Chairperson/President and assume their role if needed. Many times, the Vice President is given specific tasks, including recruitment of new members, retention of current members, or a particular program. This role also provides valuable feedback to the Chairperson/President, either about programs, member relations, or their own performance.

**Treasurer** – The Treasurer of an organization must be detail oriented, as their main responsibility is keeping orderly records of expenditures and income throughout the year. This role is also responsible for understanding financial paperwork, including processing vouchers, paying bills, and submitting requests for purchase. The Treasurer should be able to provide updated financial information at each organization meeting.

**Secretary** – The Secretary of an organization is responsible for keeping accurate minutes of each meeting and providing them to all members within a reasonable amount of time. They should also keep a record of active members and contact information, and correspond regularly with any absentee members or others reaching out to the group.

The Executive Board of an organization is expected to be active and excited about their work. Many times, the members of the Executive Board meet separately from the entire organization to discuss upcoming events and programs, create an agenda, and discuss membership. A separate meeting also allows them to develop a deeper sense of teamwork and provide mutual support.

## **Removal of a Member of the Executive Board**

Members of the Executive Board are required to maintain a cumulative GPA of 2.0 or higher and remain off of disciplinary probation. In the event that an Executive Board member falls below a 2.0 or is put on probation, they will be notified in writing with a letter sent to their home address and an email sent to their Worcester State account. The dismissed member may then offer a letter of resignation to their organization's Advisor and remaining members of the Executive Board.

## **General Members**

The General Members make up the remainder of the organization. They are active in making decisions and implementing programs and/or projects. Members should attend all meetings, volunteer for tasks that need to be done, and communicate with the organization's officers. It is important that General Members are enthusiastic about their group and are willing to put time and effort into their organization.

Membership within an organization is defined within your Charter. Typically, a student who attends three consecutive meetings (and one event, if applicable) is considered an active member. Work with your Executive Board to see if this works for your organization, and consider including a membership article in your Charter if one does not already exist.

Sometimes, it makes sense for General Members to split up into committees that work on specific events or projects. This method allows many members to feel as though they are making valuable contributions to the greater organization. Work with your Executive Board to decide if this will work for your organization.

## **Advisors**

In addition to the Executive Board, every organization has Advisors. The role of the Advisor is to advise the organization on their goals and direction. Many times, they can also offer a historical perspective, since they may have been with the organization longer than the current officers. A good Advisor will offer suggestions and a different perspective without demanding that the organization follow everything they say. Officers should seek out Advisors who are interested in their organization. Organizations may also choose to have two or three Advisors if they feel they are needed.

The following is required for someone to be an Advisor of a student organization:

- Must be a full-time staff, faculty, or administrator
- May only be an Advisor for a maximum of two student organizations at a time
- Advisors can be an Advisor for a Class Committee in addition to two other organizations

Each organization's Charter should have the process for selecting and replacing Advisors. It is important that Officers have open conversations with their Advisors, and encourage them to be active participants within the organization. An Advisor, when utilized effectively, can be one of the most valuable members of your organization; when not utilized, the organization suffers greatly. If your organization is dissatisfied with an Advisor you should discuss it with them and reassess whether the Advisor should continue in that role.

Advisors should be available and willing to attend any major events or trips that your organization is hosting.

## **Meetings**

Meetings are an inevitable part of student organizations and serve many purposes, including discussing upcoming events, planning future programs, and providing a socializing time for members. The Chairperson/President is responsible for keeping the meeting on track and productive while still allowing time for members to socialize. Meetings are typically held weekly or bi-weekly.

Additional information on meetings can be found on the companion handout Student Organization Meetings, which can be picked up in the Resource Room. This handout will cover how to run a meeting, important topics for a first meeting, and the structure of both a formal and informal meeting.

## **Student Organization Elections**

Each year, as the end of the second semester approaches, elections for officers for the following academic year should be held. Spring is an excellent time to begin talking about elections and the upcoming transition, as waiting until the end of the semester can prevent newly elected officers the opportunity of working with the outgoing officers. Your organization's Charter should have details on how your organization runs elections for new officers.

More detailed information about elections can be found on the companion handout Student Organization Elections.



## **Hazing**

Hazing, which can be defined as initiation rituals that are both dangerous and humiliating, is a practice that is both dangerous and outlawed in the state of Massachusetts. As student leaders, it is vital that you be aware of and adhere to the law regarding hazing. The law clearly states that it is the duty of every student organization to distribute copies of the hazing law to all members. A copy will be included in your club registration information at the beginning of the academic year.

The full text of the Act of Prohibiting the Practice of Hazing can be read in the Policy.

## **STORAGE, KEYS, & EQUIPMENT**

### **Storage Closets & Office Space**

The Student Center has dedicated student organization office spaces that are assigned each year. Assignments and any changes of office space assignments will be at the discretion of the OSILD staff.

In order for an assigned organization to maintain their office space, they must adhere to the following:

- Be a recognized Major Organization
- Have an updated Charter and Club Registration Form
- Post office hours and organization contact information outside the office
- Hold a minimum of four office hours each week

If your organization has an office space, you are responsible for keeping the space clean and orderly. No food should be left in the office, and the space should be cleaned thoroughly at the end of each semester. Any maintenance needed for your office space should be reported to OSILD as soon as possible. OSILD reserves the right to look in any office at any time without advance notice.

Also located within the Org Suite are closets available for student organizations to use for storage. Each year the space is re-evaluated, and either awarded to new clubs who apply for space or removed from organizations who are no longer using them.

To apply for a closet, speak with your Program Coordinator. Requests will be handled on a first-come, first-served basis. In order for an organization to have a closet, they must be a recognized organization and demonstrate a need for storage. Closets should be kept cleaned and organized. OSILD reserves the right to look in any closet at any time without advance notice.

For student organizations with an office space and/or storage closet, keys (depending on availability) can be signed out by current Executive Board members for the academic year. A key list must be made available to OSILD in order for keys to be signed out by members for the year. An additional key, as well as a key access list, will be held at the Student Center Information Desk for other members to sign out as needed. Lost keys will result in a \$30 fee.

Both closets and office space are available to use during Student Center operating hours. All closets and office entrances within the Org Suite are monitored by a security camera. The full text of the Student Organization Office Space Policy can be read in the Policy Appendix.

### **Student Organization Equipment**

Student Organizations are able to use their Line 99 to purchase approved equipment, which is defined as any single item valued at \$100 or more. Only current students, faculty, and staff may use equipment purchased by student organizations. Under no circumstances may members of a student organization allow use of their equipment by individuals not currently affiliated with Worcester State University.

Make sure that your equipment has been inventoried by WSU, and keep an inventory list available for your members if needed. Equipment should never be taken off campus without written approval from the OSILD Director. Any individual violating this procedure will be held personally responsible for the equipment if it is damaged or lost. Individuals who deliberately abuse or mishandle equipment will be held financially liable for any damages incurred and subject to judicial and/or legal action.

## **EMAIL & SOCIAL MEDIA**

### **Club Email Addresses**

All club email addresses are required to be worcester.edu email addresses. This email should be used for contacting new and incoming members and maintaining contact with members, Advisors, and event vendors. Your email will also connect to a Google Drive, which can be a great way to keep records of your organization. To be issued an email address or request your password, please contact your Program Coordinator.

### **Club Social Media**

Many organizations choose to maintain their own social media accounts on Instagram, Twitter, Facebook, Snapchat, and others. It is important to remember that these social media accounts, while not maintained by the University, are still reflective of Worcester State. Make sure to include your social media accounts on your Club Registration form. If you are choosing to no longer use an account, please make sure to delete it completely. All club social media accounts must be connected to the organization's worcester.edu email account.

## **MEMBER TRAININGS**

### **Event Planning Training**

Event Planning Training (EPT) is available online throughout the year for any student who wants to help plan an event within their organization. Topics in the training module include how to plan an event and/or trip, budgeting basics, information about fundraisers, an overview of required student organization forms, and more. Once someone has completed the EPT module, they are able to complete organization paperwork, make purchases when approved, and call vendors. You only need to complete EPT once during your time as a student leader. Please visit **worcester.edu/campus-life/clubs-organizations** to view the online module and a refresher course.

### **Budget Training**

A Budget Training workshop is also available online and is required for each organization's Treasurer; the organization's President is also highly encouraged to complete the online module. Budget Training topics include how to manage and track the club's budget, how to request Purchase Orders and pay for purchases, and buy things using the club's budget. You only need to complete a Budget Training module once during your time at Worcester State. Once you have completed the online module, you will need to schedule a review meeting with a member of the OSILD professional staff. Please visit **worcester.edu/campus-life/calubs-organizations** to view the online module and learn more.

**II – PROGRAMMING & EVENT PLANNING**

Many student organizations provide programming throughout the year for both their members and the other students on campus. Programs, or events, range from bake sales to large parties and trips, but no matter the scale, each event requires timely planning and work from organization members to ensure its success.

The full text of the Worcester State University Student Organization Event Policy and Emergency Procedures for Student Organization Events can be read in the Policy Appendix.

**PROGRAMMING TIMELINE**

Below you will find a suggested planning timeline for common events. Remember that larger events need a longer timeline, especially those with many details or trips that include additional flights, transportation, and registration fees.

Your Program Coordinator is a great resource for helping develop your programming timeline. You can also pick up a Programming Timeline Checklist companion handout from your Program Coordinator, which expands on the steps listed in the general timeline below.

2-4 Weeks	4-10 Weeks	10-12 Weeks
Bake sale Game night Club social	Comedian Fundraiser (items/shirts) Lecture Movie night Music event Party Show/performance Trip -social	Trip - conference/competition Trip - international Theme week

All purchases should be made as early as possible.

**The steps below give you a starting point for putting together your own programming timeline.**

**Brainstorming** (4-10 weeks before event)

The brainstorming stage requires you to consider all details related to your event. This includes selecting a date, time, and location for your event and developing a budget. One or two members who have completed EPT should be selected to lead the planning and implementation of the event.

**Step 1: Reserve Space**

Each May, one or two members of each organization are encouraged to attend the Planning Calendar Meeting. During this meeting, student organizations are given the first opportunity to reserve space in the Student Center and select other campus locations for their events. Student organization representatives should bring tentative event dates and spaces for the Planning Calendar Meeting so that they can be tentatively reserved for the upcoming year. While student organizations can reserve space at any time during the year, the best opportunity to reserve your first-choice space and time is during the spring Planning Calendar Meeting. If you or other members do not attend the spring Planning Calendar Meeting, room reservations can be made at any other time during the year. In order to reserve space, you will need to meet with your Program Coordinator, who will check space availability. Campus spaces can book quickly, so the sooner you meet with your Program Coordinator to reserve a space, the better. A majority of the time, you should meet with your Program Coordinator to reserve an event space versus sending an email; if there are any conflicts, you can take care of them right away. Student organizations should not book space through another office or department, or directly through Conference and Events.

*A space is only considered officially reserved once you have received an approved Event Clearance Form. Be prepared to meet with your Program Coordinator to discuss event details and space requirements as needed.*

**Step 2: Determine Budget**

Once you have reserved the space for your event, it's time to determine your budget. This means you need to sit down as a group and decide how much money you're going to spend on all different aspects of your event—everything from a speaker, performer, or artist to food, giveaways, and decorations.

If you determine that you do need additional funding, you're able to get that through co-sponsorships with other student organizations or offices, or by completing an Additional Allocation. An Additional Allocation is a form submitted to Senate when you need to ask for additional funds for an event or program. Senate will then determine your need and decide whether or not to award you these additional funds.

### **Step 3: Request Contracts & Place Orders**

The next step in the event planning process is to request a contract if you are planning on working with vendors. The contract request process can be new for many of our students so if you need help at any time or if you need advice with how to work with a vendor or an agent please feel free to reach out to your Program Coordinator.

It is strongly suggested that agents/vendors are first contacted on the phone. It's much easier to have a conversation with them about your proposed event and the related details than emailing back and forth. Once you have made an initial contact, you may then move your conversation to email.

The first thing you need from your agent is a quote. A quote provides details on all associated costs related to the service you are contracting. In addition to a cost for a caricature artist, for example, the quote may also include travel costs. The amount provided on the quote will be identical to that which is on the eventual contract.

*Important:* Worcester State does not make any payments until services have been completed, or orders have been received. Make sure that your vendor knows this. We will provide a Purchase Order at the time of agreement, which promises payment after the services has been completed.

Many of the vendors that we work with can be found on the Approved Vendors List. This list includes companies who represent comedians, musicians, and other performers, apparel companies, novelty companies, buses, and food trucks. These vendors are used to working with college students, and can be a great help in walking you through the contracting process.

You should always work with your agent to negotiate the price for services. It is important that you don't make a verbal or written agreement unless you are 100% sure that you can pay for the service and you have had a discussion with your Program Coordinator.

Once you've formally requested a contract from a vendor or an agent, please send this contract to your Advisor and meet with your Program Coordinator to review all of the contract details and determine what we can and cannot provide. Worcester State University does require that we complete a Contract

## **CONTRACTS & VENDORS**

### **Contracts**

Contracts are required any time that your organization is booking a vendor, performer, or other company to provide services for your organization and the University. You should NEVER request a contract without first discussing it with your Advisor and Program Coordinator. **All contracts must be submitted AT LEAST three weeks prior to your event.** No late contracts will be accepted without compelling circumstances, as decided by the OSILD Director.

In order to begin the process of requesting a contract, you should first talk with your group about the services you would like and the price you would be willing to pay. You may then reach out to the agent or performer regarding possible dates, price, and length of performance or timeline of service. Remember that almost all performers are willing to negotiate with you; do not be afraid to offer less than the price quoted.

In your first discussion with an agent or artist, you should always reach out for a quote, which you can then bring back to your organization for discussion. If your group decides that this is the price and performer they would like, you should then call the agent back to request a formal contract. Topics to discuss with an agent when requesting a contract include the following:

- Expectations of the event and/or service
- Amenities and/or limitations of available event space
- Explaining that the contract is subject to approval by the appropriate WSU official and cannot be guaranteed until signed
- Process for deposits—the University does not pay deposits for performers
- Process for payment following the completion of the event checks can take up to 45 days to mail following an event depending on how quickly the Student Coordinator/Treasurer begins the paperwork, and checks cannot always be handed to a performer immediately after the completion of an event



**Important:** Once you make a verbal and/or email offer and it is accepted, you are committed to it. Do not request a contract or make a firm offer until you have discussed it with your Advisor and Program Coordinator and are sure you have the appropriate funding in place. Contracts of any kind are not binding for Worcester State University unless executed in accordance with the above procedures; this includes the verbal and/or email offer.

There are currently two different processes for requesting contracts, depending on the contracted amount. Below are the procedures for student organizations:

- **Contracts under \$5,000** – Typically, contracts of this amount are fairly routine and generally known to the University. You do not need any additional approval to request a contract under \$5,000 other than speaking with your Program Coordinator.
- **Contracts \$5,000 and more** – Before requesting a contract \$5,000 or more, you are REQUIRED to submit a Contract Proposal to the OSILD for approval by necessary parties. Student organizations CANNOT request a performer's contract until they have received their approved proposal.

Depending on the amount of the contract, two to four signatures may be required. Please plan on leaving ample time in your programming timeline if you are requesting a contract for a larger amount.

Once a contract has been requested, you will sit down with your Advisor, then your Program Coordinator, to review the contract and its associated rider. The Student Coordinator should submit contracts for approval to their Program Coordinator AS SOON AS POSSIBLE after they have received it.

**There are three parts to each contract:**

- **Contract**—A contract is a document that outlines the date, time, location, and price of a service. If a performer does not have a contract the OSILD has blank Performance Contracts available.
- **Rider**—A contract rider includes additional information needed for the performance or services, including technical requirements and space setup instructions. An agency typically will provide a rider, and a

Worcester State University- specific rider is also required to be submitted with each contract.

- **Invoice**—An invoice provides details on what is being charged. All contracts must include an invoice in order to begin the process of payment

If you are planning to have multiple performers at the same event, you are required to develop a budget proposal for the entire event before you meet with your Program Coordinator. Separate contracts will have to be submitted for each individual performer.

### **New Vendors**

If you are choosing to work with a vendor who has never before worked with Worcester State, there is additional paperwork that they need to complete in order to be entered into our vendor system. This paperwork must be turned in as soon as possible, at least three weeks prior to payment, preferably with the contract and/or purchase order.

- An updated W9
- Massachusetts Terms & Conditions (available from your Program Coordinator)
- An EFT (Electronic Funds Transfer) agreement (available from your Program Coordinator)

Please have the new vendor complete this paperwork as soon as possible to help the contracting process move at a quick pace. Not all new vendors will be approved. If the new vendor is providing goods and not services, you will need to provide quotes for identical items from two existing vendors. Procurement will require two quotes from companies we currently use to prove that the proposed vendor is the most cost effective. Potential new vendors must also accept Purchase Orders and, if offering a specific discount, offer that same discount for all Worcester State orders for the following two years.

**REMINDER:** It may take up to 45 days for a vendor to be paid for their services. Please make them aware of this timeline during your initial planning conversations.

## **PUBLICITY & PROMOTION**

Publicizing your event is incredibly important in helping your program succeed. Good publicity should be posted and shared two to three weeks in advance of your event, but the publicity timeline can be different for each event.

OSILD and the Office of Communications and Marketing reserve the right to deny postings.

Publicity **MUST** include the following information:

- Name or title of the event
- Date(s)
- Time(s)
- Location
- Name of sponsoring organization
- WSU logo
- Statement from Student Accessibility Services “To request an accommodation for a program or event, please contact Student Accessibility Services at [accessibility@worchester.edu](mailto:accessibility@worchester.edu). Two weeks’ notice is appreciated.”
- Cost of the program (if applicable)
- Date tickets go on sale (if applicable)

Publicity not including all of the above information may be removed.

Creative publicity is always encouraged! You can put out all your promotion at one time, or choose to do it in stages to build anticipation and increase interest. And you can always use your event to promote other upcoming programs.

**Types of promotion include:**

- Flyers, posters, and sandwich boards
- Handouts (quarter sheets, small novelties, candy, etc.)
- Social media posts
- Promo tables

### **Student Organization Resource Room**

The Student Organization Resource Room is located on the first floor of the Student Center and is where all posters and flyers for student organizations are printed. Color and black and white copies are free for student groups.

Posters can be printed for a small fee that can be billed to the student organization's budget.

To request copies from the Resource Room, complete the Resource Room Request online at <https://www.worcester.edu/campus-life/clubs-organizations/forms-resources>. Please allow up to 48 business hours for a job to be completed.

**Please make sure that all flyers and posters are formatted to 8.5x11" and sent in PDF.** Many student groups use Canva to design their flyers; a professional subscription can be purchased using your club funds.

Once flyers have been printed, 30 copies will be hung up on lower campus and 5 copies will be dropped off with Residence Life to be displayed throughout the residence halls. This will happen automatically; if you have a special request, or don't need 35 copies for campus promotion, please include that in your request form.

You may also request large format posters for promo. These are \$8.50 per poster. There is a maximum print limit of four posters per event. Try to avoid full-color backgrounds in order to conserve ink. Large posters and display boards can be requested via the Resource Room Request form. Making this request reserves the large display boards, or "sandwich boards," for up to two weeks before your event to help with event promotion. Student Center employees will place the boards at high traffic areas around campus. If you need a display board for only one event date, please note it in the reservation form.

Display boards are available for use by any recognized student organizations. Availability is first come, first served.

## **FUNDRAISING**

### **Holding a Fundraiser**

Many student organizations participate in fundraisers throughout the year in order to increase their available funding for events. Funds can be raised for your student organization or for a specific project or program. A Fundraiser Registration Form must be completed for all fundraisers; past fundraisers have included bake sales, novelty item sales, and food sales, among others. All fundraising activities with external constituents must be coordinated with and approved by the Office of University Advancement.

When promoting any fundraiser, your advertising must be clear about what cause or organization the funds are going towards.

As stated above, student organizations may choose to raise funds for a charitable cause. The guidelines listed below must be followed:

- No funds from your SGA-allocated budget may be donated
- Funds may only be donated if the purpose of fundraising is stated beforehand and is advertised to those donating the funds
- All other policies and procedures regarding student organization expenditures are followed

It is highly recommended that you contact your Program Coordinator before committing to any donation or contribution to an outside organization. Additional paperwork is necessary, including a W9 for the organization, completed Massachusetts Terms and Conditions, an EFT form, and a letter from the student group stating that they are donating the funds to their chosen organization. This paperwork must all be filed with the OSILD before the fundraiser can be approved.

If you are hosting a bake sale, the following locations are available for reservation:

- Sullivan T
- Science & Tech Lobby
- Student Center Ramp
- Sheehan Hall Lobby (at POD entrance)

**Student organizations are unable to use Venmo, PayPal, Cash App, or similar services to collect money during a fundraiser. All funds must be collected as cash, check, or OneCard payments.**

## **Raffles**

Raffles require a longer timeline and more paperwork than many other fundraisers. All raffles must be approved in advance by the Office of University Advancement, and must take place between September 1st and April 1st. Make sure to schedule a meeting with University Advancement as soon as you know your organization wishes to hold a raffle. 50/50 raffles will not be allowed, as cash cannot be handed out as a prize.

The Massachusetts Lottery Commission requires a fee of 5% of all ticket sales within 10 days of the completion of the raffle. It is essential that all information required and the 5% fee be provided to University Advancement immediately following the raffle. Failure to do so jeopardizes the organization's chances to run a raffle in the future.

Any time your organization is soliciting donations or services from vendors, you must contact the Office of University Advancement.

The full text of the Worcester State Fundraising Policy and Solicitation of Vendors and Residence Hall Food Fundraisers can be read in the Policy Appendix.

## **PRIZES & CONTESTS**

### **Prize Money & Contests**

Student organizations sponsoring any kind of contest, game show, or event where a winner receives prize money, tickets, or items can only offer prizes to WSU students. Gift card prizes and other monetary prizes may not exceed \$50 per student per event. Cash prizes must be handed out as gift cards; no cash is to be given out as a prize.

All prizes, including gift cards and prize items, must be purchased prior to the event. Gift cards and prizes purchased on Amazon require additional time, so please plan accordingly. No prizes are to be purchased after an event has ended.

You should plan on having a discussion with your members about whether or not active members are able to participate and/or win prizes at contests sponsored by your organization. We encourage the student(s) organizing the event not to participate if there is a monetary prize; please use your discretion when making this determination for your event.

Non-WSU teams and/or individuals may win a monetary prize ONLY if the total amount is less than \$50 and another WSU student/team is participating in the same contest.

## **Gift Card Purchasing**

In order to purchase a gift card, you must first complete a Gift Card Form in the OSILD. You will not be reimbursed for any gift cards that you purchase on your own. Gift Card Forms should be turned in a month before you need the gift card in hand to account for any ordering or shipping that may be needed. Once completed, please plan on meeting with your Program Coordinator to discuss the form and next steps. Gift cards should be handed out within 30 days of purchase.

## **FOOD & ALCOHOL**

### **Food for Events and Meetings**

Chartwells provides all food and catering for Worcester State's campus. They are always willing to meet with students and work with student organizations to provide the best service they can for your events. Catering is able to work with a variety of menu ideas, and tries to be flexible to meet your needs. A specific menu for pickup-only items is available in the Wall of Forms.

Chartwells offers pickup or delivery options, as well as allows student organizations to purchase meal passes if needed for a vendor or performer. All items borrowed from Chartwells must be returned immediately following your event.

All food for campus events must be ordered through Chartwells, unless you meet with food service and complete a Third Party Release Form. A Food Service Request Form must be submitted **AT LEAST SEVEN** business days before your event. When completed, you are responsible for turning in the Food Form to your Program Coordinator. If ordering food from an off-campus provider, please keep in mind that food tax is not reimbursable.

All Chartwells invoices will be in your organization mailbox a few weeks following your event and should be processed immediately upon receipt.

### **Popcorn Machine**

A popcorn machine is available for use by any recognized student organizations. Availability is first come, first served. If you reserved the popcorn machine, please be prepared to pick it up 30 minutes prior to your event from OSILD on the second floor of the Student Center. It is your responsibility to order popcorn through Chartwells and purchase bags/boxes as needed. Cleaning supplies, pot holders, and a popcorn scoop are included with the popcorn machine.

The popcorn machine must be returned with all of its accessories within 24 hours of the end of your event. If it is late, your organization is subject to a \$25 late fee. If the popcorn machine is returned without being cleaned, your organization is subject to a \$25 fee. If the popcorn machine is returned damaged or is lost while in the possession of your organization, your organization will reimburse the OSILD the full cost of \$400.

The popcorn machine can be reserved via an online form at **[worcester.edu/campus-life/clubs-organizations](http://worcester.edu/campus-life/clubs-organizations)**.

### **Alcohol at Events**

Occasionally, a student organization will explore the option of serving alcohol at their campus event. All requests to serve alcohol are approved at the discretion of the OSILD Director. An Alcohol Request Form must be submitted and a meeting scheduled with the OSILD Director to review event details.

**If you wish to serve alcohol at your event, the following requirements must be met:**

- A separate 21+ area where the alcohol will be served
- Hard liquor bars are not permitted at on-campus student-sponsored events; only beer and wine may be served
- An advisor must be present throughout the duration of the event
- A professional bartending company with a license and insurance must be hired
- Student organization funds CANNOT be used to purchase alcohol or subsidize the drink prices
- The student organization will be responsible for any expenses incurred in contracting the service
- The student organizations will be responsible for any expenses for University Policy as required by the Director of the OSILD

If your event is off-campus, Worcester State University assumes no liability for any accidents, injuries or damage to property which may result from the activities of any person legally or illegally attending any off-campus function. The establishment at which the off-campus function is being held is responsible for enforcing all Massachusetts General Laws regarding the sale/consumption of alcohol. Worcester State University has no care, custody or control of the facility. All security, maintenance and management of the facility are the sole responsibility of the employees of the facility. The



organization may be required to provide a shuttle bus to transport students to and from the event (subject to the discretion of the OSILD Director) The full text of the Worcester State Alcohol, Illegal Drugs, and Substance Policy can be read in the Policy Appendix.

## **MISCELLANEOUS PROGRAMMING INFORMATION**

### **Movie Copyright Laws**

If your organization is considering showing a movie, be sure to budget for the necessary copyright fees, which can range from \$300 to \$100 depending on the popularity of the film. Copyright law prevents you from renting a movie or showing your personal copy without paying additional copyright fees. This includes streaming movies or shows from your personal accounts or YouTube.

### **Event Liability Waiver**

Some events, depending on the activity, will require participating students to complete an Event Liability Waiver. Events that may require an Event Liability Waiver include a zip lining trip, white water rafting, inflatable obstacle course, car bash, bubble soccer, and others as determined by your Program Coordinator. An Event Liability Waiver is available in the Wall of Forms in OSILD.

### **Property Damage During Event**

Any damages (for example, broken windows, furniture, equipment) sustained at an event sponsored by a student organization will be the responsibility of that group. The organization will be billed for the repair or replacement of whatever has been damaged/repared. Worcester State University reserves the right to refuse future use of Worcester State University facilities until the cost of damages is reimbursed by said organization. Damages should be reported to the Program Coordinator as soon as possible. All changes to a technology setup or room setup should be handled by CESO and not members of the student group.

### III – BUDGETS & FINANCES

Every active student organization is allocated funds each year from the Student Activities Trust Fund, or SATF, which is funded by the Student Activities Fee. The Student Senate Budget Committee is responsible for determining the amount that each organization receives for the upcoming academic year. These funds can be used for programs and events throughout the year.

- Major Organizations have money awarded to their organization within different lines, based on their previous budget request. Any money that is not spent from this allocation is returned to the SATF at the end of the year.
- Special Interest Groups are awarded \$500 each academic year. Any money that is not spent from this allocation is returned to the SATF at the end of the year.
- Each student organization has a Line 99 in addition to their allocation, which is established through fundraising, donations, or ticket sales. This money carries over from year to year.

Every organization needs a Treasurer on their Executive Board. This person is responsible for overseeing the spending and budgeting for their organization, as well as keeping all financial records. They should be the best resource in your organization for questions related to finances.

Only the organization's Treasurer or President/Chairperson is able to complete financial paperwork. No club Advisors and/or Coaches are to make any purchases for the student organization.

If your budget is not approved, you are able to appeal the decision by attending a Student Senate meeting. Once the budget is approved by Senate, it is then approved by the SGA President and the appropriate OSILD administrator.

## **CLUB BUDGET BASICS**

### **Bookkeeping**

The Treasurer is responsible for keeping accurate records of their organization's budget. All new Treasurers are required to complete the Budget Training Workshop, which is available online. It is also highly encouraged that organization Presidents complete the training as well. The Budget Training Workshop will help familiarize each Treasurer with the current policies and procedures regarding the processing of all bills and how to set up a budget tracking system.

Once the Treasurer and President have completed Budget Training, they will receive view access to the OSILD copy of their organization's budget, which is kept on Google Drive. This copy of the budget can be used to check your work throughout the year, but the Treasurer is still HIGHLY encouraged to keep their own copy that they make changes to and keep records in. This can be set up in Excel, Google Sheets, or however else they are comfortable tracking the budget. Any staff member in the OSILD is able to help you set up a budget.

### **Line 99**

The budget should also include detailed information on the organization's Line 99. Line 99 is any money generated by the organization through admission, ticket sales, raffles, food and novelty sales, other fundraisers, or small donations. The funds in this line remain with the organization year to year, and may be used for any purpose consistent with the organization's mission as long as it is not in violation of any WSU or SGA policy and approved by OSILD.

It's important to remember not to spend expected funds. Many student organizations will plan a fundraiser and use the expected profit to plan an event. No event paperwork should be completed or orders be submitted until all funds are in place and available in your Line 99.

Funds earned through OneCard fundraising are not available until 60 days after an event.

## **Line Transfers**

Major Organizations may also choose to move their funds around if necessary. Occasionally you may realize that you are no longer hosting an event that you had anticipated when developing your Budget Packet, and feel that the funds would be better used in another line (for example, moving funds from a “Campus Events” line to a “Trips” line). You are able to complete a Line Transfer Request online and ask the Senate Treasurer for permission to move the funds. The Treasurer will respond within 48 business hours that the request was received.

Organizations should never commit more funds than they have in a specific line item before gaining approval to transfer funds from the Senate Treasurer. Liability for over-spending is on the organization’s Treasurer and any officer who authorized the expenditure.

Line transfer requests will not be accepted after April 1st without compelling circumstances, as determined by the Senate Treasurer and the OSILD Director.

Funds cannot be transferred in or out of Line 99. Funds cannot be transferred out of the Advisor Travel Line.

## **Additional Allocation**

At any point throughout the year student organizations are able to request an Additional Allocation, which provides additional funding. Depending on available funds, Senate will consider the request and either award or deny the additional funding. A cap on Additional Allocation request amounts is determined by the OSILD Director as needed.

In order to request an Additional Allocation, you must complete the first part of the online Additional Allocation Form. The organization requesting the additional allocation should be prepared to justify the need for additional funding, and may need to meet with the Finance Committee or Senate to discuss their request. The Senate Treasurer will respond within 48 business hours that the request was received. Once the request is submitted, the Senate Finance Committee will review and make their recommendation to Senate.

Additional Allocation requests will not be accepted after March 1st without compelling circumstances, as determined by the SGA Treasurer and the OSILD Director.

## **Last Day to Spend Funds**

The last day to spend funds is Reading Day. Expenditures will not be permitted after this day without compelling circumstances as determined by the OSILD Director.

## **Budget Packets & Hearing (for Major Organizations Only)**

In the spring, Major Organizations will receive a Budget Packet in their mailbox. The SATF Budget Request Form must be completed by the student organization in order to receive funding for the upcoming year. Once submitted, Major Organizations must then present their Budget Packet to the Student Senate Budget Committee. Failure of a student organization to submit a budget and attend a budget hearing before the posted dates could result in no funds for the following year.

Within the Budget Packet, you are responsible for outlining your budget line-by-line. Rather than asking for a large sum of money, you should put some thought into what that money will specifically be used for. For example, instead of asking for \$2,000, you can request in your Budget Packet that you need \$1,000 for four events throughout the year at \$250 each, \$500 for food at those events, and \$500 for publicity. This enables members of the Budget Committee to better understand what your group will be using the funds for throughout the year, as well as provides direction for your organization.

Budget lines can be different for every student organization, and your Program Coordinator will be able to help you decide what is best for your club. Only one conference or competition will be funded with the exception of competition fees for Club Sports. An Advisor Travel Line can be added to the budget as well, to cover costs associated with attending one competition.

Following the submission of your Budget Packet, you are required to sign up for a budget hearing with the committee. During this hearing, you and other members of your student organization are responsible for presenting your budget and answering any questions that the committee may have about your requests. The Budget Committee then makes recommendations about your budget approval to the Senate, which votes on each Major Organization budget.

If your budget is not approved, you are able to appeal the decision by attending a Student Senate meeting. Once the budget is approved by

Senate, it is then approved by the SGA President and the appropriate OSILD administrator.

## **PURCHASING & PAYMENTS**

### **Finance Terms to Know:**

- **Purchase Order (PO)** – A PO is a number provided to a company that guarantees payment after the completion of a service or order.
- **Invoice** – An Invoice provides a breakdown of what services you are paying for and their different amounts, if required. Invoices are typically submitted with contracts and used when working with artists or vendors who are providing services.

### **Finance Form**

The Finance Form multiple purposes:

- Make a purchase using club funds
- Pay a vendor for a service
- Reimburse a club member for a purchase they made using their own money
- Get permission for a member to spend over \$100 to be reimbursed
- To make a donation with funds generated from a fundraiser

The Finance Form can be found online.

### **Purchase Orders**

Many vendors that work with Worcester State will accept Purchase Orders (POs) for services and goods. This is the University's preferred payment method, and you should always plan on asking a vendor if they accept POs. Amazon, 4imprint, Oriental Trading, and Silver Screen Designs are frequently used agencies that require POs.

When your organization begins the process of ordering items, booking a bus, reserving a hotel for a conference, or anything else that requires a PO, a Finance Form should be completed and submitted to the Bookkeeper in OSILD along with an attached quote of the item or service. A completed Finance Form does not mean that items have been purchased or reserved; when you receive a signed Finance Form in your organization's mailbox, you

are then approved to make the final purchase or reservation. The PO will be listed on the returned Finance Form.

It is your organization's responsibility to give the PO number to the company you are working with when placing the order. You may not exceed the total allocated budget or the amount allocated for the PO. Liability for over-spending is with the Treasurer and officer who authorized the expenditure.

Make sure that you do not commit your organization to any purchases until the Finance Form has been approved and returned. Without the proper approval, the organization officer or member committing the funds may be held personally liable for any expenditure.

Finance Forms should be submitted at least six weeks in advance of when you need the PO. This allows plenty of time to place orders and make any necessary changes. Finance Forms will not be accepted less than six weeks prior to an order without compelling circumstances, as determined by the OSILD Director.

### **Payments for Services**

A Finance Form is also what the University uses to generate checks. They must be completed any time that you are making a purchase, including on-campus purchases at Chartwells and the Bookstore. Finance Forms must be submitted with a copy of the bill or purchase receipt.

Submitting a PO does not mean that the vendor has been paid for their items or services. Once an order has been received or a service has been provided, you must then complete a Voucher to provide payment. All Finance Forms must be signed by the Treasurer or Chairperson and the organization Advisor. Payment vouchers should never be pre-signed by the Advisor and will not be accepted unless properly dated by both the advisor and the treasurer.

**Checks will not be rushed due to lack of planning, so plan ahead. Checks can take up to 45 days to be generated and sent by the University.** When working with vendors they should be made aware of this policy. It is important to remember that you must always submit an invoice to generate payment.

The OSILD Director retains the right to approve all purchase and payment requests. Invoices not approved will be returned to the organization's Treasurer with an explanation.

## **Other Methods of Payment**

If a company does not accept a PO, you have additional payment options:

- **Check without a PO** – the vendor or performer must submit an invoice, and a Finance Form will need to be submitted to the OSILD.
- **Personal Reimbursements** – You can choose to make a purchase for your organization and be reimbursed at a later date. When deciding whether you want to pay for a purchase and be reimbursed, keep the following in mind:
  - You must keep the original receipt and turn it in to OSILD.
  - You will not be reimbursed any sales tax.
  - Any items being ordered online must be sent directly to the OSILD office, not a personal address.
  - All requests for reimbursements must be made within 30 days of making the purchase.
  - Any personal purchase for reimbursements may not exceed \$100 total unless prior approval has been authorized and a Finance Form has been completed.
  - **The receipt for reimbursement cannot include any items purchased for personal use.**

The OSILD may process payment for legitimate bills that have not been paid by your organization if the Treasurer fails to process payment. No payments may be made over Venmo, PayPal, or Cash App.

**No purchases are to be made without prior approval.**

## **Purchases over \$5,000**

There are two processes for purchases over \$5,000:

- **\$5,000-\$9,999** – The Commonwealth requires that any purchase that falls within this range must have three written quotes from three different companies unless the company is listed on the MHEC list. Please meet with your Program Coordinator to initiate this process.



- **\$10,000 and over** – The Commonwealth requires that any purchase over \$10,000 needs to have sealed bids unless the company is listed on the MHEC list. Please meet with your Program Coordinator to initiate this process.

## **Sales Tax**

As a state institution, Worcester State University is exempt from the state sales tax. Some companies will need our tax exempt number and/or tax exempt certificate; both are available in the Wall of Forms. Treasurers should never include a sales tax on a Finance Form.

## **PARTIES, GIFTS, & MEMBER CLOTHING**

### **Parties & Gifts for Members of Student Organizations**

Many student organizations like to celebrate the end of the year with a party or banquet to recognize the work and effort of their members. Any on- or off-campus social event involving food that is not publicized and open to the entire Worcester State University community will be considered a student organization party and be subject to the following restrictions:

- Only funds from Line 99 may be used for the event.
- Use of unauthorized/unapproved funds and over-expenditures from Line 99 will not be honored/processed. Legal and financial responsibilities in such cases will be the responsibility of the organization's officers.
- Student organization funds cannot be used to purchase alcohol or subsidize drink prices.
- All food ordered for student organization members only has to come from Line 99. Any event that is paid for with SGA funds must be open to and advertised for the entire WSU community.
- There is a \$50 limit on individual recognition awards for outgoing officers, seniors, Advisors, etc. and all funds have to come from Line 99.

### **Clothing for Members of Student Organizations**

Often, student organizations will purchase shirts or other clothing items for their members. Policies for clothing are as follows:

- T-shirts promoting an organization or specific event can be purchased from the organization's SGA-funded budget lines (i.e. Advertising, Spring Week).

- All other apparel for personal use of only the members of the organization must be paid for with Line 99 funds.
- No more than \$50 per person can be spent on one single clothing item unless approved by the OSILD Director.

Final decisions regarding funding for apparel is at the discretion of the OSILD Director.

## **MISCELLANEOUS FINANCE INFORMATION**

### **Cash Boxes & Deposits**

Occasionally you will need to request a cash box for an event or fundraiser. This can be done on the Fundraising Form, and must be requested for any event in which money will be changing hands. A Fundraising Form should be turned in at least two days before you need a cash box for your event. Cash boxes can be picked up at 8:30am the day of your event in the OSILD.

If you anticipate handling a large amount of cash and checks during the event, you can schedule pickups. If the Student Center is not open during your event, your Advisor should take the cash box and secure it in their office overnight. **It should be brought to the OSILD immediately the next day.**

All money collected (cash and checks) must be deposited in the OSILD on the same day it was received. It can be turned in to the OSILD staff or Student Center Manager and will be kept in the safe. Prior to turning in the cash box, the money should be counted by the Treasurer. A deposit receipt will be provided to the Treasurer, who may then use this to update the organization budget.

All checks must be made payable to Worcester State University, not the student organization. The name of the student organization should be written on the memo line.

Cash should never be spent. It must always be deposited. No separate bank accounts can be set up for various organizations.

### **Payment in Kind**

The State Auditor has made it clear that Payment in Kind (bartering services or ads for goods) is not acceptable. Student organizations cannot provide services or ads for outside companies unless they are being paid for them. For instance, the student radio station cannot run an ad for a local restaurant

unless they are paid to do so. Individuals accepting payment for services or ads provided for by student organizations will be subject to disciplinary action and prosecution. For instance, if the Cheer Team mats are used at an outside event, any money the sponsoring organization pays for this service must be deposited with the Cheer Team, not the individual who used the equipment. Checks must be made out to Worcester State University and deposited with the OSILD.

## **IV – SOCIAL TRIPS & OFF-CAMPUS EVENTS**

Off-campus events sponsored by student organizations must follow the same approval process as on-campus events. Off-campus events that involve travel, like a trip to Boston or NYC, must also follow all Worcester State University Travel Policies. All off-campus trips and events should have a contract or letter of agreement with the facility/vendor which must be submitted to the OSILD for review. An Advisor or Advisors are required to attend all off-campus events, including trips and functions.

Trips can take a lot of time to organize, so plan on starting the planning process 10-12 weeks prior to your intended trip date. The six steps below give you an outline of the trip planning process. Feel free to use this as a guide, and work with your Program Coordinator to ensure that you are completing the steps in a timely manner for your planned trip.

### **Step 1: Brainstorming Stage**

This stage includes researching your trip venue, ticket prices, and possible dates for your trip. A budget should be developed to determine the cost per person, and you should reach out to any co-sponsors or apply for an Additional Allocation if necessary. A student who has completed EPT should be selected to coordinate all aspects of the trip.

### **Step 2: Submit a Trip Proposal**

Once quotes have been collected, you may complete the Trip Proposal. Confirm with your trip Advisor(s) to make sure they are available, and decide whether or not outside (non-WSU) guests will be allowed on the trip. Wait for approval of the Trip Proposal before moving forward with securing any trip arrangements.

### **Step 3: Make Reservations & Create Tickets & Publicity**

Once the Trip Proposal has been approved, make sure to call all vendors/buses/locations back to book your trip. You may need to work with your Program Coordinator on the payment process. You must then submit a Ticket Form to your Program Coordinator; this generates the creation of tickets to put on sale at the Student Center Information Desk. Develop a publicity plan for ticket sales.

#### **Step 4: Final Preparations**

A couple of days before the trip, reach out to any students who purchased tickets with any last minute information, if necessary. You may also obtain a copy of the ticket sale sheet from the Information Desk to use for check in. Call the bus company to confirm pick up time and location for the date of your trip, and get a contact number for the bus driver for the day of your trip.

#### **Step 5: Trip Day!**

You should plan to arrive at the trip departure location (typically the Student Center Exhibit Area) 30 minutes prior to when students will be arriving in order to prepare any necessary paperwork. If real tickets are necessary for admission, remember to collect them from OSILD, as well as any check that may need to be brought. Make a sign for the bus(es) so that students can easily find the correct bus at the conclusion of the trip. Take copies of the Emergency Contact Form and Out of State Liability Waiver to University Police prior to departure; remember to keep the yellow copy for yourself to take on the trip in case of emergency. Give your contact information to all students on the trip so that they can get in touch with you if needed.

#### **Step 6: Event Evaluation & Wrap Up**

Evaluate the trip at your weekly club meeting and take notes to reference back when planning your next event. What went well? What would you change for next time? Submit any receipts or invoices to your treasurer for payment.

The companion handout Trip Timeline Checklist provides more details on each of these steps. Every timeline is different depending on the event being planned and the steps that need to be taken. The most important thing to remember is to keep your Advisor and Program Coordinator informed about your event.

#### **Trip Proposal**

The Trip Proposal is the most important form when planning a trip. You are required to submit a Trip Proposal for any trip, whether it is a social event, conference, competition, or off-campus practice. The Trip Proposal must include information about trip Advisors, ticket costs, transportation costs, and the anticipated number of tickets that will be sold and the price that they will be sold for. You **MUST** wait to book any aspect of your trip until you have received an approved copy of your Trip Proposal in your mailbox. Trip Proposals **WILL NOT** be accepted less than three weeks prior to a trip without compelling circumstances, as determined by the OSILD Director. No portion of a trip should be booked by an Advisor or Coach unless approved by the OSILD Director.

## **Advisors**

A majority of trips require two Advisors. If you have two buses for a trip, an additional Advisor will need to attend, so you will need to find three for the trip. The final number of trip Advisors is at the discretion of the OSILD Director.

During any trip, an Advisor is a representative of Worcester State University and should conduct themselves as such. Advisors should keep a copy of the Emergency Contact Form on them at all times in case of emergency. In the event of an emergency or other issue during a trip, the Advisor shall provide assistance. The organization's Program Coordinator should be made aware of any trip issues as soon as possible. Advisors receive one free ticket for the trip that they are advising, and have the option of purchasing a ticket for a guest at full ticket sale price.

## **Buses and Other Transportation**

In many cases, student organizations choose to utilize a coach bus for their trips. When buses are part of the trip, it is mandatory that all trip attendees and Advisors take the bus both ways. This ensures the safety of trip participants as well as allows everyone to arrive at the same time (in the case of a show or times entrance).

If a trip is local, personal vehicles may be used for travel. Any students driving their own vehicle or riding in the vehicle of another student are required to complete a Non- University Vehicle Waiver. This must be turned in to the OSILD and University Police prior to departure.

In the event that your trip will require flights, please let your Program Coordinator know as soon as possible. All flights need to be booked through the University, and in order to ensure the best prices, must be booked early.

## **Ticket Sales**

All tickets for student organization sponsored trips must go on sale at the Student Center Information Desk. This includes any trips that are being funded using ANY SATF funds. If a trip is being covered 100% by a student organization's Line 99 they are not required to be put on sale.

In order to receive tickets to be sold at the Information Desk, you must first complete a Ticket Form with your Program Coordinator. This sheet will be used by the Info Desk staff member selling the tickets. This sheet will also be sent to the Resource Room, where a Program Assistant will design and print your tickets. Once printed, they will be delivered to OSILD to be put

on sale the following day. Ticket Forms are due at least one week before the intended sale date. Please plan ahead when requesting tickets - it can take up to 72 business hours for the design and copy job to be completed.

Tickets sales must be advertised at least one week prior to their sale date. Tickets must be on sale for at least two weeks prior to a trip, and all tickets go on sale when the Information Desk opens in the morning. During this time, they are only able to be sold to students and guests, if applicable. After two weeks, ticket sales may then be open to faculty and staff. There is a two-ticket limit per person unless otherwise approved by the OSILD Director. When determining your ticket sale timeline, please take into consideration the last possible date your venue will allow you to cancel in the event enough tickets aren't sold.

**Tickets may be set aside as follows:**

- 1 ticket for each Advisor attending the trip
- 1 ticket for each Student Coordinator (up to two) attending the trip
- All other tickets must be put on sale.

There are no refunds of tickets for students who decide they can no longer attend. Students may resell their tickets, but only to another student who has not previously purchased a ticket and is eligible to attend. Students wishing to sell their ticket(s) to other students must report the sale to the staff at the Information Desk so they can update the sales records.

**Canceled Trips**

There are some instances when a trip may need to be canceled, either due to low attendance or bad weather.

If the trip includes a purchased ticket to an attraction/show/etc, the trip will continue no matter how many tickets have been sold. If the trip is non-ticketed (i.e. a trip to Boston for the day), the trip will be canceled if less than 50% of tickets have been sold in accordance with the bus company's cancellation policy.

Any time the University is closed for weather or other related emergencies, all events and trips for that day are canceled. Trips that include non-refundable tickets for a specific date or event will continue at the discretion of the Program Coordinator.

All trip cancellations are at the discretion of the OSILD Director.

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### **Off-Campus Trip Contact**

On the day of your trip, all trip attendees must complete the Off-Campus Trip Contact form, which can be found online. This form has three purposes:

- Collects emergency contact information for all trip attendees
- If the trip is out of state, trip attendees must agree to the Out of State Liability statement
- If the trip requires attendees to drive their own vehicle, trip attendees must agree to the Non-University Waiver statement

In a majority of cases, this form should be completed on the day of the trip. Please talk with your Program Coordinator to learn more about completing this form for your upcoming trip.

The full text of the Worcester State University Student Travel Policies can be read in the Policy Appendix.



## **V – TRAVEL FOR CONFERENCES & COMPETITIONS**

Throughout the year, many student organizations plan to attend a conference or competition. Depending on the location of this trip, planning can take anywhere from 10-12 weeks, so plan to begin the process early. The following steps should be taken when organizing a trip for a conference or competition:

### **Step 1: Budgeting and Attendees**

Collect information on how much the conference/competition will cost. This includes transportation, lodging, registration, meals, and other necessities. Decide if you will need to reach out for an Additional Allocation.

This is also the stage when you should decide who will be attending the trip, including Advisors, so you can provide an accurate number of attendees to your Program Coordinator. Please check with trip attendees to ensure that they have the proper travel credentials (license, state ID, passport, etc.).

A projected total cost of the trip should be shared with all potential attendees, especially if they will be expected to pay out of pocket. Students should complete a Delegate Contract and turn in a copy to OSILD - this holds students accountable for the funding of their spot on the trip. Work with your Program Coordinator to develop a payment timeline for the trip.

### **Step 2: Trip Proposal & Attendee List**

Once all information has been collected and the trip has been priced out, complete the Trip Proposal. No part of the trip can be booked, or reservations be made, until you have received an approved Trip Proposal. If you need help completing this form, please make an appointment with your Program Coordinator.

You should also put together a list of the students/Advisor(s) attending the trip that includes the amount each person owes for the trip and the dates the money is due. This can be turned in to your Program Coordinator and is used to track incoming payments.

With the exception of extenuating circumstances, no changes should be made to this attendee list.

### **Step 3: Make Necessary Reservations**

Using the information from your approved form, you may now begin the process of making any necessary reservations or registering members. Keep your Program Coordinator informed on any important payment deadlines. Finalize any payment plan that may be needed for trip attendees to ensure funding is in place in time to make final payments. Advisors and/or Coaches cannot make any reservations or bookings; all conference and camp registrations should be made by your Program Coordinator.

### **Step 4: Final Preparations**

As the trip gets closer, begin to collect any documents you need to bring with you. Develop a trip itinerary and attendee contact list that can be shared with all attendees, your Advisor(s), and your Program Coordinator. Necessary travel forms (Emergency Contact, Out of State Liability Waiver) should be completed, and originals handed in to University Police. Call to confirm any transportation or registration as needed. In the event of a multiple-day trip, email a copy of all attendees along with an itinerary of the trip to your Program Coordinator.

### **Advisors for Conferences and Competitions**

Advisors are required for most off-campus trips; the number of Advisors required is as follows:

- Trip within New England and New York, day only – No advisor needed
- Trip within New England, overnight – 1 Advisor for any number of students
- Trip outside New England but within the United States –  
1 Advisor for up to 10 students,  
2 Advisors for 11 or more students
- Trip outside of the United States – 2 Advisors for any number of students

The final number of Advisors for any conference or competition is at the discretion of the OSILD Director.

During any trip, an Advisor is a representative of Worcester State University and should conduct themselves as such. Advisors should keep a copy of the Emergency Contact Form on them at all times in case of emergency. In the event of an emergency or other issue during a trip, the Advisor shall provide assistance. The organization's Program Coordinator should be made aware of any trip issues as soon as possible.

## **Advisor Funding**

Senate will fund the required number of Advisors for up to two events per year; each additional Advisor will be at the cost to the student organization or the Advisor themselves. Senate funding will cover the hotel/accommodation and conference registration. Food will not be covered by Senate, but can be funded through another office or department. Advisors will only be funded for a competition if the Worcester State University team/delegation is competing. Student organizations can choose to complete an Additional Allocation if they need additional funds to cover Advisor travel.

## **Buses and Other Transportation**

In many cases, student organizations choose to utilize a coach bus for their trips. When buses are part of the trip, it is mandatory that all trip attendees and Advisors take the bus both ways. This ensures the safety of trip participants as well as allows everyone to arrive at the same time (in the case of a show or times entrance).

If a trip is local, personal vehicles may be used for travel. Any students driving their own vehicle or riding in the vehicle of another student are required to complete a Non-University Vehicle Waiver. This must be turned in to the OSILD and University Police prior to departure.

In the event that your trip will require flights, please let your Program Coordinator know as soon as possible. All flights need to be booked through the University, and in order to ensure the best prices, must be booked early. All team members and coaches/advisors must travel on the same flight unless otherwise deemed appropriate by the OSILD Director.

## **Reimbursements**

Students who attend a conference or competition are able to get reimbursed for meals, mileage, and parking expenses - these costs should be factored in when completing the Trip Proposal. Reimbursement requests must be submitted within 30 days of returning from the trip; a Meal and Mileage Reimbursement can be found in the Wall of Forms. Reimbursements will come from the student organization's budget, and should be included in the initial list of trip expenses.

### **State mandated meal rates are as follows:**

- \$8 for breakfast if leaving campus before 6 a.m.
- \$11 for lunch if you've been at an off-campus location for 24 hours
- \$20 for dinner if off-campus past 7 p.m.

The amounts above are the maximum amounts for meal reimbursements, per day. The most updated meal rates can be found at [www.afscme13.org](http://www.afscme13.org).

## **VI – CLASS COMMITTEES & SENIOR TRIPS**

Along with Major Organizations and Special Interest Groups, Class Committees are also considered active organizations. Committee members are selected from an applicant pool their junior year, and senior year is spent executing plans for senior trips and events.

### **Membership**

Members of the Class Committee are selected during their junior year. Applications must be submitted, and students are selected after the application and interview process. Once selected, they are a member of the Class Committee until graduation. Each Class Committee selects a Chairperson and a Treasurer. At the end of their senior year, the Class Committee selects two faculty/staff Advisors to work with them throughout senior year.

Members are expected to maintain their class standing in order to remain a member of the committee. All members are also expected to attend all events and trips their senior year. While on trips, committee members are expected to conduct themselves as student leader representatives of Worcester State.

### **Class Committee Budgets**

The summer before senior year, the class committee receives \$32 for every graduating student. That money is then used for programming during senior year.

### **Senior Event Trip Ticket Policy**

This policy was created to accommodate seniors who have student-teaching or a clinical before tickets are put on sale at 9 a.m. at the Information Desk.

- If a senior is unable to purchase tickets due to the above reasons, he/she can give his/her WSU Student ID to another senior to wait in line.
- The senior waiting in line will be able to purchase their own two tickets as well as one additional ticket for the senior whom they are purchasing for.
- No guest ticket is allowed for the senior who is not actually present to purchase tickets.
- Both seniors must be on the updated senior list.
- This courtesy will only be made on the first day that tickets go on sale for the senior events.

**Deadline Grid**

Form	Deadline	Location
Additional Allocation Request	6 weeks before funds are needed; March 1 <sup>st</sup> is the last possible date to submit	Online
Amazon Purchases	6 weeks before event	
Club Registration Form	December 1 for new clubs; April 1 for clubs looking to re-recognize	Online
Contracts	3 weeks before event	N/A
Delegate Contract	Prior to first payment being made by trip attendees	Wall of Forms
Event Clearance Form	3 weeks before event	Online
Event Liability Waiver	Day of event	Wall of Forms
Finance Form	6 to 8 weeks before an item is needed when making a purchase; within 30 days of purchase when seeking a reimbursement	Online
Food Service Request	7 business days before event	Online
Fundraiser Registration	2 weeks before event	Online
Line Transfer Request	2 weeks before funds are needed; April 1 is the last possible date to submit	Online
Meal & Mileage Reimbursement	Within 30 days of returning from a trip	Wall of Forms
Non-University Vehicle Waiver	1-2 days prior to trip departure	Online
Office & Closet Key Sign-out	Start of semester	Wall of Forms
Out of State Liability Waiver	1-2 days prior to trip departure	Online
Performance Contract (WSU)	3 weeks before event	Wall of Forms
Resource Room Request	2 weeks before promotion begins	Online
SATF Budget Request Form	Date determined by Senate in spring semester	Online
Ticket Sale Information Sheet	1 week before ticket sale date	Program Coordinator
Tickets on Sale	2 weeks before trip/event date, adjusted as needed to meet cancelation deadline	
Trip Proposal	10-12 weeks before anticipated trip date	Online
Trip Emergency Contact	1-2 days prior to trip departure	Online

## **POLICY APPENDIX**

### **★ Act of Prohibiting the Practice of Hazing**

#### **CHAPTER 656 - THE COMMONWEALTH OF MASSACHUSETTS AN ACT OF PROHIBITING THE PRACTICE OF HAZING**

Be it enacted by the Senate and House of Representatives in the General Court assembled, and by the authority of the same as follows:

**Section 17** Whoever is a principle organizer or participant in the crime of hazing as defined herein shall be punished by a fine of not more than three thousand dollars or by imprisonment in a house of correction for not more than one year, or both such fine and imprisonment. The term “hazing” as used in this section and in sections eighteen and nineteen, shall mean any conduct or method of initiation into any student organization, whether on public or private property, which willfully or recklessly endangers the physical or mental health of any student or other person. Such conduct shall include whipping, beating, branding, forced calisthenics, exposure to the weather, forced consumption of any food, liquor, beverage, drug or other substance, or any other brutal treatment or forced physical activity which is likely to adversely affect the physical health or safety of any such student or other person, or which subjects such student or other person to extreme mental stress, including extended deprivation of sleep or rest or extended isolation.

Notwithstanding any other provisions of this section to the contrary, consent shall not be available as a defense to any prosecution under this action.

**Section 18** Whoever knows that another person is the victim of hazing as defined in section seventeen and is at the scene of such crime shall, to the extent that such person can do so without danger or peril to himself or others, report such crime to an appropriate law enforcement official as soon as reasonably practicable. Whoever fails to report such a crime shall be punished by a fine of not more than one thousand dollars.

**Section 19** Each institution of secondary education and each public and private institution of post-secondary education shall issue to every student group, student team or student organization which is part of such institution or is recognized by the institution or permitted by the institution to use its name or facilities or is known by the institution to exist as an unaffiliated student group, student team or student organization, a copy of this section

and sections seventeen and eighteen; provided, however, that an institution's compliance with this section's requirements that an institution issue copies of this section and sections seventeen and eighteen to unaffiliated student groups, teams or organizations or endorsement of said unaffiliated student groups, teams or organizations. Each such group, team or organization shall distribute a copy of this section and sections seventeen and eighteen to each of its members, plebes, pledges or applicants for membership. It shall be the duty of each such group, team or organization, acting through its designated officer, to deliver annually, to the institution an attested acknowledgment stating that such group, team or organization has received a copy of this section and said sections seventeen and eighteen, that each of its members, plebes, pledges, or applicants has received a copy of sections seventeen and eighteen, and that such group, team or organization understands and agrees to comply with the provisions of this section and sections seventeen and eighteen.

Each institution of secondary education and each public or private institution of post- secondary education shall file, at least annually, a report with the regents of higher education and in the case of secondary institutions the board of education certifying that such institution has complied with its responsibility to inform student groups, teams, or organizations and to notify each full time student enrolled by it of the provisions of this section and sections seventeen and eighteen and also certifying that said institute has adopted a disciplinary policy with regard to the organizers and participants of hazing, and that such policy has been set forth with appropriate emphasis in the student handbook or similar means of communicating the institution's policies to its students. The board of regents and, in the case of secondary institutions, the board of education shall promulgate regulations governing the content and frequency of such reports, and shall forthwith report to the attorney general any such institution which fails to make such report.

Approved January 5, 1988

## ★ Student Organization Office Space Policy

### Office Space Expectations

1. The office space is to be utilized for legitimate activities; meetings, gatherings, and business of the student organization.
2. Sleeping, overnight stays, the use or possession of alcohol or illegal drugs is prohibited.
3. Student organizations are not permitted to formally or informally share their space with another on campus or off campus group without the express written permission of the Director of Office of Student Involvement and Leadership Development.
4. Hosting outside visitors in student organization offices is permitted when the activity is congruent with the student organization's purpose.
5. All offices must have posted office hours on the door to the office. Each organization is required to have no less than 4 office hours per week.
6. The key list and office hours list must be submitted to OSILD together prior to any keys being signed out.
7. All offices must have the door wide open during office hours to provide a more welcoming atmosphere. Door stops will be provided by our office for this purpose.

### Access to Office Space & Keys

Members of student organizations may access the office during normal operating hours of the Student Center. A calendar of operating hours can be found in OSILD.

The President/Chairperson of the organization must provide the OSILD a list of approved members for key access. Only names submitted by the student organization will be eligible to sign out the key at the Information Desk. All names submitted must be WSU students or staff. Once the key is signed out they will be liable for a \$30.00 fee if the key is lost. If it is determined that the lock needs to be changed, that cost will be assessed to the student organization.

The President/Chairperson may update their list of approved members at any time by submitting them to the OSILD Secretary.



Up to four officers, depending on available office keys, are eligible to acquire a key to office space after a key list has been submitted. Key requests must be filled out by each individual with the OSILD Secretary. The key must be returned by the end of the academic year or immediately upon resignation of your position. Failure to do so will result in sanctions, including a hold on your transcript. A cost of \$30.00 will result in your failure to return your key. Keys cannot be signed out until a list of office hours has been given to the OSILD secretary.

### **Temporary Closing of Office Space**

During college breaks, when student groups will not be accessing student office space regularly, the following process should be followed in order to ensure a safe environment. (Groups will continue to have access to the office during breaks in accordance with the building schedule.)

- Removal of all perishable property and food items
- Unplug all electrical appliances
- Clean off all desks, chairs, cabinets
- Turn off all lights
- Shut and lock all doors

### **Office Furniture/Equipment**

Each office will be provided with basic furniture and equipment. The organization is responsible for the furniture within the space at move-in. Any furniture present at move-in must be present at the end of the year. Moving furniture to another location is prohibited. For safety reasons, any additional furniture/equipment that the student organization would like to add to the office must be approved by the Office of Student Involvement and Leadership Development and the appropriate Facilities staff member.

### **Office Care and Maintenance**

Members of each student organization assigned to office space are responsible for the cleanliness of the office. It is also expected that members will ensure proper maintenance and safety of the office at all times. If furniture, equipment or other areas are damaged, notify the Office of Student Involvement and Leadership Development and a work order will be issued. Custodial staff will empty your trash on a regular basis, but are not expected to clean your office. Please leave your trash cans outside of your office each evening.

### **Office Inspections**

The University retains the right to inspect the office space for the purpose of maintenance, sanitation, and safety concerns. Some walk-throughs may occur in the event that the staff finds it appropriate to do so due to building and safety concerns.

### **Food**

Food is allowed within the office, as long as the members take responsibility to clean up after themselves and to remove all food waste and return appropriate trays to Chartwells.

### **Sanctions**

The University reserves the right to sanction student organizations in violation of the above policy. Sanctions may include, but not be limited to, suspension or revocation of office space equipment.

The OSILD reserves the right to assign organizations to share an office space. If multiple groups are assigned to the same office space, every effort will be made to provide adequate furniture and equipment in order for effective sharing. Please be courteous and respectful if you are sharing an office space.

## ★ Worcester State University Alcohol, Illegal Drugs, and Substances Policy

All policies and regulations regarding the consumption and/or sale of alcoholic beverages on the Worcester State premises or off-campus where Worcester State jurisdiction applies shall be in strict conformity to the appropriate Massachusetts General Laws, the regulations of the License Commission of the city of Worcester, and in compliance with the Drug-Free Schools and Communities Act (DFSCA), and the Drug-Free Schools and Campuses Regulations.

### References:

Mass. General Law, Chap. 138, Sec. 34: Alcoholic Beverages (Procuring for persons under 21); Mass. General Law, Chap. 138, Sec 34A: Alcoholic Beverages (Procuring by false pretenses); Mass. General Law, Chap 138, Sec. 34I3: Alcoholic Beverages (Liquor Purchase Identification Cards); Mass. General Law, Chap. 138, Sec. 34C: Alcoholic Beverages (Transportation by those under 21 years of age); Worcester City Ordinances Chap. 9 re: Open Alcoholic Beverage Containers.

In addition to the preceding laws and others which may be established by legislative bodies, the following rules and regulations apply to Worcester State premises or off- campus where Worcester State jurisdiction applies:

- Worcester State prohibits the possession, consumption, storage, service or in the presence of alcohol by students with the exception of prior approval from the Dean of Student Affairs or designee:
- Students are not allowed in the presence or in possession of empty or full containers (alcohol, including decorative containers).
- Public intoxication is prohibited.
- Operating a vehicle under the influence of alcohol is prohibited.
- The manufacturing of any alcoholic beverage is prohibited.
- Students are responsible for informing their guests of Worcester State's Alcohol Policy prior to any campus visit. The student will be held strictly accountable for an alcohol violation when their guest violates the alcohol policy. Guests are defined as any person visiting the student whether or not the guest has signed-in to the residence halls through official procedures. Guests, regardless of their age are not permitted to bring alcohol onto the Worcester State campus.
- Providing alcoholic beverages to a person under age twenty-one (21), whether gratuitously or for sale, is prohibited.

- The possession or use of alcoholic container(s) which indicates the probability of common source drinking (e.g. kegs, punch bowls, beer balls, or the functional equivalent) is prohibited and shall result in a more severe sanction.
- Drinking funnels, taps, ice luges or similar devices are prohibited
- Creating, offering, and playing drinking games such as beer pong are considered endangering behaviors and are prohibited.
- Open alcoholic beverage containers (including cups containing alcohol) are prohibited. Additional Guidelines
- Intoxicated persons shall be subject to police intervention including medical transport, arrest, and/or other appropriate action.
- In the event that a student is suspended from Worcester State housing or from Worcester State University for any disciplinary infraction(s), including but not limited to alcohol, no refund of any Worcester State fees, tuition, room, or meal plan costs will be given to the student.
- Any backpack, bag or similar container that anyone carries onto campus shall be subject to inspection and search by a member of the Worcester State staff whenever there exists reasonable suspicion to believe that the container is being used to bring onto campus any alcoholic beverage or other material in violation of Worcester State Policy
- In the spirit of the WSU's We Speak Up Bystander education program, students are encouraged and expected to seek help from Worcester State University Police or other Worcester State staff when they witness others who are incapacitated due to alcohol or other drug use.

## ★ Worcester State Fundraising Policy for Solicitation of Vendors & Residence Hall Food Fundraisers

Worcester State University has adopted the following policy on fundraising activities with external constituencies.

The policy of Worcester State University requires that all fundraising activities with external constituents must be coordinated with and approved by the Office of University Advancement. For additional information or to discuss raising funds for a particular project or program in which you have an interest, please contact the Student Involvement Office and the Office of University Advancement.

### **Raffles**

At times, student organizations wish to raise funds through raffles. All raffles must be approved in advance by the Office of University Advancement. Raffles are allowed only from September 1 to April 1. If you are interested in running a raffle, you must discuss it with the Office of University Advancement.

Please note that the Massachusetts Lottery Commission requires a fee of 5% of all ticket sales within the (10) days of the completion of the raffle. It is essential that all information required and the 5% fee be provided to the Office of University Advancement immediately following the raffle. Failure to do so jeopardizes the organization's chances to run a raffle in the future. State law requires this information.

Bingo nights and casino events have special requirements. Please meet with the Director of Student Involvement if you are considering planning one of these events.

### **Contributions to Charitable Organizations**

Student organizations may choose to raise funds for various charitable causes under the following guidelines:

- A. No student activity fee income may be donated.
- B. Line 99 funds (money raised as part of their regular fundraising activities, admission, etc.) may be donated only if the purpose of the fundraising is stated beforehand. (i.e., A student organization may decide to hold a fundraiser for a particular purpose but cannot donate funds that they have raised as a part of their regular fundraising activities.)

- C. SGA funds may be used to purchase items for an event where the final product is being donated to a stated charity (i.e. you may purchase healthcare items using SGA funds if you are hosting an event where students will be stuffing the bags to be donated).
- D. All other policies and procedures regarding student organizational expenditures are followed.
- E. Please contact the Office of Student Involvement and Leadership Development before committing any donation or contribution to any outside organization.

### **Policy Regarding Solicitation of Vendors Approved by Executive Leadership Team**

The Office of University Advancement manages Worcester State University's corporate cultivation and solicitation process and facilitates and monitors alliances with companies. To coordinate appeals and avoid duplicative and competing requests, the Office of University Advancement tracks corporate activity, including donations and sponsored research. Worcester State University faculty, staff, or student groups must receive prior approval if they wish to request cash or in-kind support on behalf of a Worcester State University program or project.

Vendors who provide products and services related to interests of Worcester State University and its students are considered primary sponsorship candidates and may be contacted for program sponsorship for financial and/or in-kind support. Departments are encouraged to share information and contacts regarding vendors with whom they do business. This policy prohibits individuals or groups from soliciting sponsorships directly from these vendors without prior consultation with the Office of University Advancement.

In consideration of conflict of interest issues, appeals to individuals, vendors and businesses with current or the potential for having a future commercial relationship with Worcester State University will be made in the spirit of philanthropy with no overt or implied promises of future business or threat of withdrawal of business. Purchasing and development functions within Worcester State University will remain completely separate.

September 22, 2004

For more information contact: University Advancement Office, ext. 8033

## **Residence Hall Food Fundraisers**

1. Only WSU organizations and teams are allowed to hold fundraisers in the Residence Halls.
2. Any group requesting space for a fundraiser must fill out a Fundraising Form. Requests must be submitted a minimum of two weeks in advance.
3. All requests are subject to the approval of the Residence Hall Office. Student organizations must also be approved by the Office of Student Involvement & Leadership Development. Athletic teams must also be approved by the Athletic Office.
4. Groups are expected to be respectful of residents and not disturb residents in any way.
5. Residence Life reserves the right to stop the fundraiser if the Advisor/Coach is not present or if the group violates any of the above listed policy.
6. Groups that do violate any of the above policies may be subject to further sanctions to possibly include future use of the Residence Halls for additional fundraisers.

## ★ Worcester State University Student Organization Event Policy

Worcester State University supports and encourages recognized student organizations in planning and implementing programs consistent with the goals of the membership. Student sponsored events (i.e. dances, concerts, festivals, parties, etc...) provide meaningful opportunities for students to socialize, as well as opportunities for student leaders to learn through the planning, implementation, and organization of social events. Worcester State University recognizes that events sponsored by student organizations are the direct responsibility of the officers and advisors of the organizations.

The Office of Student Involvement and Leadership Development is responsible for assisting organizations in reviewing the proper planning and coordination of events. This does not mean it is the responsibility of OSILD to plan the event. It is the responsibility of the members and advisors of the student organization to ensure proper planning of events.

OSILD provides Event Planning Training, or EPT, numerous times each semester to teach members how to plan an event. Only organizations that have participated in one of these workshops will be allowed to schedule an event for their organization.

Acts of violence have recently become more frequent at social events in college and university settings. Faculty, college administrators, and student leaders are increasingly vulnerable to the possibility of litigation. Student leaders need to be aware that they could be sued for injuries or damages occurring at a program sponsored by their organization. Therefore, it is imperative that proper precautions are taken in planning each event. This policy provides specific expectations for managing student social events.

When planning events, it should be decided whether or not an event is open to the public, meaning there may be attendees who are not Worcester State students. This determination will impact the attendance of the event and the staffing of Worcester State University Police.

Event sponsors must select appropriate space for each event so that attendance will not exceed the maximum room capacity. The Office of Student Involvement and Leadership Development facilitates arrangements such as requests for Worcester State University Police, cleaning, and Student Manager details through the program clearance process. The sponsoring



office or student organizations are responsible for any personnel or equipment costs resulting from an event, such as food service, maintenance, police details, or staffing when an event goes beyond the normal operating hours of the Student Center. In addition, the sponsor will be responsible for all damages, any and all theft, or vandalism resulting from the sponsorship of the activity and the use of the facility.

**NOTE:** Events where alcoholic beverages are served must comply with the guidelines established in the Policies and Procedures Regarding Alcoholic Beverage Use section which can be found in this handbook.

### **Responsibilities of the Student Organization Sponsor**

In order to hold an event, student organization sponsors must:

#### **Before the event:**

- Attend the Office of Student Involvement and Leadership Development Event Planning Training workshop on how to plan a Student Center sponsored event.
- Meet with the Office of Student Involvement and Leadership Development staff at least two weeks prior to the event to discuss specifics of the event and to complete room reservation/ program clearance form.
- Reserve desired room with appropriate facility reservationists.
- Identify two (2) student organization members to work as on-site contacts during the event.
- Participate in a pre-event meeting with the advisor, Worcester State University Police and other personnel relevant to the event.

#### **During the event:**

- Attend the event from start to finish.
- Wear name badges/stickers (some are available in Office of Student Involvement and Leadership Development) or clothing which clearly identifies them as the event sponsors to advisors, Worcester State University Police officers, guests and other relevant personnel.
- Perform event management duties during the entire event as applicable to the type of event, including selling tickets, collecting tickets, checking IDs, registering guests, managing the stage area and overseeing the audience activity.

- Assist with crowd control, including emergency exit monitoring and notifying Worcester State University Police, advisors or Student Center personnel of any problems that arise during the event.
- Announce the approved ending time of the event during the activity.

### **After the event**

- Announce that the event has ended.
- Assist in clearing people from the facility.

### **Pre-Event Meeting**

The student organization or office, event sponsors, advisors, a senior Worcester State University police officer, and other personnel relevant to the event are expected to meet to discuss the logistics of the event immediately prior to the start of the event. The purpose of this meeting is to provide introductions among assigned personnel, a review of assignments and clarification of the following:

- When will the doors open? When will they be locked?
- Who are the students responsible for the event?
- Which event sponsor is supervising student security personnel? How will the student security be identifiable to the officers?
- What do the tickets look like? Are they unique, numbered in order and difficult to copy?
- What is the admission charge? Who is responsible for the cash box?
- What is the procedure for securing cash collected during the event?
- Who has the sign-in sheets? Who has the guest list? (if applicable)
- What is the event schedule?
- Other questions?

### **Responsibilities of Student Organization Advisors**

Student Organization Advisors are expected to familiarize themselves with the contents of the Synergy Student Leader Handbook. The handbook includes information on general liability, event management, alcohol policies, Worcester State University rules and procedures and the role and responsibilities of an advisor. Advisors are encouraged to attend one of the Event Planning Training workshops with their student leaders.

### **Student Organization Advisors Should:**

- Attend the event from start to finish.
- Supervise the student members working the event.
- Assist in supervising the event to include periodic monitoring of attendees, enforcing all Worcester State University policies and procedures, clearing people from facility after the event.
- Serve as a liaison between the student organization and the Worcester State University Police officers assigned to work the event or activity.
- Coordinate and attend a brief pre-event meeting of the leaders of the sponsoring student organization, the Worcester State University Police officer on duty and any other involved personnel. The purpose of the meeting will be to review all details of the event and the responsibilities of individuals working the event.
- Ensure that predetermined light levels for the event are maintained, as described in the Protocols for Open Events section of this policy.
- Assist in resolving any problems reported by members of the sponsoring student organization.
- Terminate the event if any violation of policies or any security and/or safety concerns warrant such action after consultation with the student leaders and the Worcester State University Police officers.

### **Responsibilities of the Worcester State University Police Officers**

Worcester State University Police officers are assigned to work student social events as determined by the chief or designee. A minimum of three police officers will be assigned to any dance or concert event that anticipates attendance of 150 or more. If Worcester State University Police Department exhausts their detail list, they will hire Worcester Police Department to assist the Worcester State University officers with the event. The club that is hosting the event will still be responsible for paying said officers. The number of officers assigned to a specific event to provide an atmosphere of safety and security will be determined by the Worcester State University Police Department depending on the following influencing factors:

- Anticipated number of event participants
- Room/facility size and/or number of entrances and exits
- Whether or not alcoholic beverages are served
- Need to provide special protection for areas (i.e. parking lots, rest rooms, lobbies or other areas outside the facility)
- Presence of non-Worcester State University attendees
- History of violence at similar events
- History of illegal or unauthorized use of alcohol at similar events.

Worcester State University Police officers assigned to an event will remain stationed near the site of the event unless an event- related disturbance occurs elsewhere in the building. The officers are expected to assist event sponsors when appropriate and serve as a background presence. Problems that do not appear to have a threatening element or a potential criminal offense involved will be initially addressed by a member of the sponsoring organization in a peer type manner. Assigned officers are expected to:

- Participate in a pre-event meeting.
- Provide close back up to students or staff assigned to check ID cards.
- Assist the event sponsors in their efforts to control the behavior of persons attending the event.
- Patrol the venue and monitor the hallway, rest rooms and event activities for illegal behavior. Deter criminal activity at the event.
- Discourage loitering outside the event.
- Take enforcement action as needed.
- Assist in summoning medical and fire responders if needed.
- Assist event sponsors in dispersing attendees at the conclusion of the event.

### **Protocols for Public Events (Revised 10/2/06)**

Worcester State University reserves the right to deny admission to anyone who does not comply with the prescribed security measures for any particular event.

### **Admission**

The following is required for admission to an open event:

- Dance and contemporary concert events will be limited to students with a Worcester State University ID. Worcester State University students are allowed 1 guest (18+only, proof of age required). Worcester State University students must sign-in their guest at the door with both the WSU student and guest clearly printing their name on a sign-up sheet.
- Other open events (not dance and contemporary concert events) require a Worcester State University ID or a photo ID verifying age 18+ for any attendee who is not a WSU student.

A minimum of three police officers will be assigned to any dance or concert event that anticipates attendance of 150 or more. If Worcester State University Police Department exhausts their detail list, they will hire

Worcester Police Department to assist the WSU officers with the event. The club that is hosting the event will still be responsible for paying said officers.

## **Advertising**

Advertising for an event should clearly state the security measures and expectations that attendees are required to adhere to.

**The following information must be included in advertising an event:**

- Date, time, place, sponsor and ticket price
- Valid Worcester State University identification (ID) required for admittance
- Picture ID required for non-Worcester State University students (college ID required for dance and contemporary concert events)
- Non-students must be 18 years of age or older or must be accompanied by a parent or guardian
- Other security measures deemed necessary during the program clearance process.

## **Signs at Entrance**

The sponsoring organization is responsible for providing signs at all entrance doors that clearly state the following:

- A valid Worcester State University or other college ID is required for admittance at dance and contemporary concert events.
- Guests must provide a photo ID with proof they are 18+ years of age and must sign in at the door as a guest of a specified Worcester State University student.
- The host of the event will not allow re-entry to any patron who leaves the dance after 12:30 a.m. The host is responsible for signage indicating the re-entry policy. The admission doors will close no later than 1:00 a.m., or 1 hour prior to the stated ending time of the event.
- Smoking is prohibited within the building.
- Cameras and/or recording devices are not permitted.
- Sponsors reserve the right to inspect bags, purses, etc., as a condition of admittance.
- Alcohol is not permitted.
- Bottles, cans or other containers such as water bottles, soda cans will not be permitted.
- Chains or similar articles that may be hazardous will not be permitted.

- Note the times doors will open and close.
- Satisfactory compliance with the above policies is expected. Individuals may be removed and/or the event may be terminated for failure to comply.

### **Ticket Sales and Collections**

Tickets must be numbered sequentially and cannot exceed the maximum room capacity. When calculating tickets vs. room capacity the number of staff and size of stage must be factored in. Tickets must specify the times doors open and close. On completion of ticket sales, reconciliation, including total number of tickets sold and unsold (still in possession) and total cash proceeds, must be completed with the appropriate advisor and/or other Worcester State University personnel. All proceeds must be promptly deposited through the Office of Student Involvement and Leadership Development. Proceeds may not be deposited into external accounts or held as cash. It is not advisable to hold large amounts of cash, or wait to deposit proceeds until after the event. The Office of Student Involvement and Leadership Development is available to assist student organizations in locating a ticket manufacturer and with ticket sales.

### **Checking IDs**

Students and/or Worcester State University staff assigned to check identification may only accept a valid Worcester State University ID for current students and a picture ID indicating birth date for guests who are not WSU students. If the validity of an ID is questionable, students and/or Worcester State University staff assigned to check IDs are encouraged to request assistance from the Worcester State University Police officer at the event. When alcohol is being sold or served at an event, checking IDs is the responsibility of the alcohol provider at on-campus events, and the authorized non-Worcester State University affiliated personnel of the facility hosting the event, i.e. club, restaurant, hotel, banquet facility, etc.

### **Age Requirement**

Individuals who are under 18 years of age and are not current Worcester State University students must be accompanied by a parent or guardian.

## **Lighting**

Minimum lighting must be provided at all times during an event. Exit signs must be lit and cannot be obstructed in any way. There must be adequate stage or overhead lighting in order to see audience members and to see across the facility at all times. The senior Worcester State University Police officer on detail will determine if lighting is sufficient.

## **Crowd Behavior**

Inappropriate behavior including, but not limited to, crowd surfing, stage diving, slam dancing, moshing or other behavior that creates a risk to dancers and/or bystanders is strictly prohibited and will be cause for removal and possible disciplinary and/or legal action.

## **Sanctions**

Student organizations and/or individuals that violate or fail to adhere to this policy and protocols without specific authorization from the Office of Student Involvement and Leadership Development will be subject to legal or disciplinary action as appropriate. This could include actions which affect the recognition status or privileges of the student organization and/or its members.

## **Duration of Event**

All events will end by (or before) 2 a.m. Requests to extend the ending time beyond 2 a.m. will be considered by the Office of Student Involvement and Leadership Development as part of the program clearance process.

**Police Officers and Advisors** and the Student Center Building Manager will do a walk through the building 15-30 minutes prior to the start of the event.

Exits of any students, emergency notwithstanding will be done through the bookstore entrance.

## **Emergency Procedures for Student Organization Events**

Situations may arise when decisions must be made by the appropriate Worcester State University personnel that affect the outcome of a student organization's event. **WORCESTER STATE UNIVERSITY RETAINS THE RIGHT TO TAKE ANY ACTION DEEMED NECESSARY TO ENSURE THE SUCCESSFUL IMPLEMENTATION OF THE EVENT AND THE SAFETY OF ALL ATTENDEES.**

**The following procedures have been developed to prevent emergency situations and to handle an emergency if one develops.**

1. Sponsoring organizations must post signs at all entrances to an event detailing pertinent information regarding the rules governing the event (e.g., time doors close, guest policy, etc.)
2. Violent or disruptive acts by individuals will not be tolerated. Individuals engaging in these acts are subject to immediate ejection and/or arrest.
3. The ranking professional staff person on duty at an event shall have the authority to make decisions that will alleviate any potential dangers to the attendees, including immediately ending an event, if necessary.
4. No decision to end an event early shall be made without first attempting to consult with all appropriate personnel including representatives from the student organization. If it appears necessary to end an event the ranking staff person shall inform the Dean of Student Affairs of the decision prior to the implementation of the decision if possible.

The ranking of staff person on duty shall be in descending order:

- #1 Director of Campus Police
- #2 Campus Police Duty Supervisor
- #3 Director, Office of Student Involvement and Leadership Development
- #4 Office of Student Involvement and Leadership Development  
Professional Staff
- #5 Student Organization Advisor



## ★ Worcester State University Student Travel Policies

Worcester State University recognizes that enrollment as a student does not curtail the freedom to travel that is generally secured to members of our society by the Constitution and laws of this country. In addition to travel that is a normal incident of any person's enrolling as a student—commuting between home and Worcester State University, for example—students are free to travel, as they wish and in whatever way they wish to museums, libraries, sporting events, social and cultural activities, and to a multitude of other destinations that are encouraged by their personal, educational and intellectual interests. To this kind of personal travel the Student Travel Guidelines are of no application, for Worcester State University seeks neither to regulate nor to control any individual student's personal freedom to travel.

Worcester State University does, however, impose certain requirements and controls in connection with travel that it formally sanctions or sponsors. While Worcester State University reserves the right to impose special requirements in any individual case, the general rules that are of application to such travel are set forth in these Student Travel Guidelines.

### 1. Who May Sponsor

- a. Worcester State University-sponsored travel is travel that is sponsored by Worcester State University itself through one of its departments or offices. In every case, a Worcester State University-sponsored student travel program requires the prior approval of the vice president of Student Affairs.
- b. Worcester State University-sanctioned travel is any travel/trip sponsored by a recognized student organization, club or athletic team (beyond regularly scheduled season's contests). This shall include individual travel related to the business/purpose of the organization, club, or team, and group travel (e.g., a bus trip within the state, all travel outside the state, and any overnight trips). In all cases, Worcester State University-sanctioned travel program must be approved by the Dean of Students or their designee.
- c. An individual may not solicit or offer trips to the campus population as an independent representative of a travel agency or tour operator. This is designed to prevent the "stinging" of participants, which has often occurred in the past when an inexperienced student was hired as an "agent" by a travel company or tour operator. Any student's failure to comply with this procedure may result in judicial action by Worcester State University.

## 2. Who Must Approve

In every case, Worcester State University-sponsored or Worcester State University-sanctioned travel requires prior approval of either the Dean of Students or their designee or the provost/vice president of Academic Affairs or their designee.

- a. Travel sponsored by an academic department or other academic program must be approved by the provost/vice president of Academic Affairs.
- b. Travel sponsored by athletics, a recognized student organization, or club must be approved by the Dean of Students.

3. Once a Worcester State University sponsored or sanctioned travel plan has been decided, representatives of the sponsoring organization must meet with the professional staff person designated by the Dean of Students, or provost/vice president of Academic Affairs.

4. As soon as possible after the deadline for submission of price quotations, the appropriate professional staff person (athletics director, advisor, coach, faculty member) and student leader (for non-athletic clubs/teams only) shall submit, to the Dean of Students or the provost/vice president of Academic Affairs, the specifics of the travel program for review and approval. This proposal shall include:

- a. Purpose, dates, and itinerary
- b. Estimated number of participants
- c. Number and names of chaperons
- d. Copies of price quotations and names of selected vendor(s)
- e. Source(s) of funding for the trip
- f. Financial breakdown of total cost of trip.

5. Worcester State University reserves the right to require, as a condition of any student's participating in any Worcester State University- sanctioned or Worcester State University-sponsored travel, that the student or his/her guardian sign a waiver of all claims against Worcester State University and its employees for liabilities that may arise out of such travel. Worcester State University may impose this requirement whenever Worcester State University-sponsored or Worcester State University-sanctioned travel occurs outside (or inside, e.g., paintball, skydiving) the Commonwealth of Massachusetts.

6. Worcester State University shall require the student organization's, club's or team's advisors, coach or professional staff person(s) to accompany any trip which in the judgment of Worcester State University requires the presence of a professional staff member. His/her duties will be to assist in securing the services contracted. The staff member will also assist the members of the student organization and the participants in following the established guidelines for the trip.

7. Written contracts will be required with all vendors. The agreements shall contain specific information to include: exact overall costs; hotel costs; transportation costs; departure and return dates; times and locations; number of spaces provided; name of hotel(s) and public transportation carrier(s); clear statement of refund policy; payment deadlines if applicable; the availability of complementary spaces; a clear statement delineating routine or special expenses not included in the price of the trip. A copy of all contracts must be on file in the office of either the Dean of Students or the provost/vice president of Academic Affairs.

8. Individuals may forfeit deposits in the event they cancel out of the event and cannot find a replacement. All cancellation, refund and deposit policies must be clearly stated in the contract. A copy of these policies, which will vary from trip to trip, must be given to each participant prior to his/her initial deposit; and the participant must read, and sign, a copy of the cancellation, refund, and deposit policy.

9. All trips will be offered either to students only (or students and a guest only) first. For example, a Spring Break trip to Florida would be offered "to students only" first, while a Senior Class Trip to NYC may be offered to "seniors and a guest only" first. A trip offered "students only" first shall have a specified time period announced for students to reserve spaces. Thereafter, additional available spaces may be filled by a student adding a guest to the list and paying the appropriate deposit.

10. Participants in any Worcester State University-sponsored or Worcester State University sanctioned travel are expected to behave responsibly. Students who violate standards of conduct set forth in this or any other Worcester State University policy will be subject to the procedures and sanctions of the student judicial code. All participants in such travel are personally responsible for any injury or damage they cause to other persons or their property and Worcester State University, or its agents, assume no

liability for any such damage or injury. All participants are personally liable for any costs, however incurred, that are not included in the travel package as advertised.

11. The travel agency or tour operator will be required to carry adequate liability insurance and/or show proof of adequate liability coverage by carriers.

12. It is the responsibility of the students to be aware of and adhere to departure times. Participants who miss travel connections are personally liable for any costs incurred in securing substitute transportation.

13. Worcester State University assumes no liability for a student choosing to ride in a private vehicle to or from the trip's destination. Participants who travel in private vehicles do so at their own risk.

14. Student organization may subsidize a trip's cost. Any complimentary trips will be decided by the organization's officers and advisor(s). Attendance at an educational program or conference related to the organization's purpose can be subsidized up to one hundred percent (100%).

15. Neither Worcester State University nor any student organization assumes any financial or other responsibility for its or any other person's failure to provide in whole or in part, any service or product in connection with any Worcester State University-sponsored or Worcester State University sanctioned trip; nor does Worcester State University or any student organization assume any financial or other responsibility for the quality of any such service or product that it or any other person does provide in connection with any such trip. In the case of every trip, it is responsibility of the travel agency, tour operator and other vendors of services and products. Worcester State University may in any particular case, but at its sole discretion, take such steps as it deems appropriate to secure such vendor's fulfillment of any obligations undertaken in connection with a trip to secure refunds from vendors with respect to services or products not provided or not properly provided, but Worcester State University assumes no obligation to take such steps and no liability in consequences of its doing so. Worcester State University assumes no obligation to make refunds to students in the event a trip is canceled, postponed, or altered.

## 16. International Travel Requirements

- a. Passport must be valid for at least six months after the return date.
- b. Check to see if a visa is required to enter the country or countries to which travel is planned. International students, or students in other visa status, must check with Worcester State University's international student advisor.
- c. Check with your health insurance provider to ensure you will be covered overseas. Consider an additional insurance plan, which covers medical evacuation and repatriation. Information is available at the International Programs Office.
- d. Travel to countries that the U. S. Department of State has issued travel warnings for will not be approved by Worcester State University. Check with International Programs for the latest warnings.
- e. Make sure that all documents are prepared for travel and you have copies of them at home with a relative or other responsible person, including passport and visa information, credit card number(s), and insurance information.
- f. Student organizations looking to travel internationally must meet with their program coordinator at least three months in advance.

## 17. Required for Student Organization Bus Trips

Advisors are required for all bus trips. A minimum of two advisors for the first bus and an additional one for each additional bus is required.

## ★ Worcester State University Title IX Policy

Worcester State University is committed to creating and maintaining an academic and work environment that is free from sex discrimination (including discrimination on the basis of sex, sexual orientation, gender identity, and gender expression) and sexual misconduct (including sexual harassment, sexual assault, domestic violence, dating violence, and stalking).

Adherence to this commitment is ensured by University policies against discrimination and compliance with The U.S. Department of Education's Office for Civil Rights (OCR) Title IX of the Education Amendments of 1972. Title IX protects people from discrimination based on sex in education programs or activities that receive Federal financial assistance.

### Title IX states:

No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving Federal financial assistance.

### Title IX Scope:

Title IX prohibits sex discrimination in all university programs and activities, including, but not limited to, admissions, recruiting, financial aid, academic programs, student services, counseling and guidance, discipline, treatment of pregnant and parenting students, class assignment, grading, recreation, athletics, housing, and employment.

The Title IX Coordinator is charged with managing the University's response to reports of sex discrimination, which includes reports of sexual assault, sexual harassment, gender-based harassment, dating violence, domestic violence, stalking, and retaliation. Guided by University and federal procedures, the Title IX Coordinator aims to ensure that the University's response promptly, effectively, and equitably addresses the incident, prevents its recurrence, and remedies the effects of all forms of such prohibited conduct. In some instances, Title IX issues may impact a student's academic performance. Eligible recipients of academic accommodations will be determined and coordinated by the Title IX Coordinator.

Inquiries regarding Title IX may be referred to the Title IX Coordinator, Jennifer Quinn, Director of Title IX at [Jquinn@worchester.edu](mailto:Jquinn@worchester.edu), [wsu\\_titleix@worchester.edu](mailto:wsu_titleix@worchester.edu), 508-929-8243, or in person in the Student Center, room 338. A report may also be filed at this link:

**<https://tinyurl.com/33dkeaxy>**. Reports may be submitted at any time,

even during non-business hours but please note the Title IX Coordinator does not monitor email on a 24 hour basis and may not review on weekends and evenings. Therefore contact may not be available during non-business hours except by referral from University Police.

**If you are not safe please contact  
University Police immediately at 508-929-8911**

