The Eagle Source

A Guide for Student Organizations 2009-2010

The Eagle Source has been provided by:
The Office of Student Leadership & Service
The Student Government Association

Program, Event Management, and Financial Guide

EMORY
Student Leaders,

Welcome to the Eagle Source. The Office of Student Leadership & Service (OSLS) has designed this section to help student organizations plan the best events possible. We hope that this section of the Eagle Source will assist students by providing a guide for sound structure planning for new and existing programs. It is also our hope that this guide will help our student leaders to become proactive in spotting difficulties that may arise with each event.

We have divided this Eagle Source into 3 sections: the Basic Student Organization Information section, the Program & Event Management section (which contains descriptions of University, local and state policies and procedures relevant to planning programs at Emory University) and the Treasurer’s Handbook section (which contains information vital to any student organization treasurer.) This will increase the likelihood that you will be able to easily find the information that you need.

A small number of Eagle Sources are printed at the start of each year. A limited number of copies may be found outside of the OSLS, or the SGA offices. Should any changes or corrections be made to the policies or guidelines contained herein, the most up to date version can always be found on the OSLS website: http://www.osls.emory.edu/eaglesource.

We are here to answer your questions! If you are unable to find what you are looking for in the Eagle Source or on our website, please contact us directly by emailing us at lead@learnlink.emory.edu.

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(Contact OSLS about event planning)

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**Other Useful Forms Online at** [www.osls.emory.edu/eaglesource](http://www.osls.emory.edu/eaglesource)
- Advisor Agreement Form
- DUC/COX Reservation Request
- Academic Reservation Request
- Traffic Circle Reservation Request
- Banner Reservation Form (Outside the DUC)
- OSLS Banner Reservation Form (Inside the DUC)
- Balloons, Chalking, Art Grids, and Rolling Display Panel Reservation Request
- DUC Commons Tables Tents
- Cox Hall Table Tents
- DUC Programming Co-sponsorships
- DUC Ticket Acceptance Form
- Performance Event Contract
- Safe Driver Enrollment and Consent Forms
- Example of Small Dollar Reimbursement Form
Deciphering the alphabet soup:
A Quick Guide to Some Commonly Used Emory Acronyms

**ADA**- Americans with Disabilities Act.

**CC**- College Council ([http://www.euturpe.com/cc/](http://www.euturpe.com/cc/)), the student representation for students within Emory College.

**DUC**- the Dobbs University Center ([http://www.emory.edu/DUC/](http://www.emory.edu/DUC/))

**ECCH**- the Emory Conference Center and Hotel ([http://www.emoryconferencecenter.com/](http://www.emoryconferencecenter.com/)). This is a great place for upscale events, retreats, and to use for guest accommodations.

**EPD**- the Emory Police Department ([www.emory.edu/EPD](http://www.emory.edu/EPD))

**FDR**- Faculty Dining Room, located within the DUC. SGA meetings are held here on Monday nights.

**First Friday's**- see free performances by some of Emory's most talented students on the first Friday of every month, outside of the DUC.

**FMD/CS**- FMD is the former name of Campus Services ([www.fm.emory.edu](http://www.fm.emory.edu)). They can assist your club with electrical/ staging needs or event clean up. See the “Working with Campus Services” section of the Eagle Source.

**F@10**- Friday's at 10! free.fun.friday's. A programming series offered by SPC & OSLS.

**Dooley**- the "Spirit of Emory" and the unofficial mascot of the university. Dooley is a skeleton and is usually dressed in black. The name "Dooley" was given to the unofficial mascot in 1909. Each year in the spring, during Dooley's Week, Dooley roams Emory's campus with a team of bodyguards and lets students out of class with unscheduled appearances in their classrooms. He typically walks slowly with an exaggerated limp. He adopts the first name and middle initial of the University's current president. As such, Dooley's current full name is James W. Dooley. You can email him on LearnLink!

**Swoop**- the official Emory Eagle mascot.

**GBS**- Goizueta Business School

**GSAS/GSC**- Graduate School of Arts & Sciences. Students enrolled within the Graduate School of Arts and Sciences are represented by their divisional council of government, the Graduate Student Council.

**ISSP**- the office of International Student & Scholar Programs ([http://www.emory.edu/ISSP/](http://www.emory.edu/ISSP/))

**LL**- LearnLink

**ODS**- the Office of Disability Services ([www.ods.emory.edu](http://www.ods.emory.edu))

**OEO**- Outdoor Emory Organization ([www.students.emory.edu/OEO](http://www.students.emory.edu/OEO))

**OMPS**- the Office of Multicultural Programs and Services ([www.emory.edu/MULTICULTURAL](http://www.emory.edu/MULTICULTURAL))

**OSFL**- the Office of Sorority and Fraternity Life ([www.emory.edu/GREEKS](http://www.emory.edu/GREEKS))

**OSLS**- the Office of Student Leadership & Service and one of the offices who cosponsored this manual.

**RHA**- the Residence Hall Association ([http://www.emory.edu/HOUSING/ABOUTUS/rha.html](http://www.emory.edu/HOUSING/ABOUTUS/rha.html))

**RSPH**- the Rollins School of Public Health
The Eagle Source: A Guide for Student Organizations

SAAC- the Student Activities and Academic Center (http://www.emory.edu/HOUSING/CLAIMONT/saac.html), on the Clairmont Campus; sometimes referred to as “the S-double A-C.”

SAAAC- a student organization; Students in Alliance for Asian American Concerns

SAF- the Student Activity Fee. This is a fee that every student pays. SGA manages a portion of this money but gives most of it back to each division to manage in a way that best suits their needs. The current SAF is $86 per semester. The fee is adjusted every 3 years in order to keep pace with costs. Items that the SAF has been used for: free newspapers for students, the Lennox Shuttles, the lights on McDonough Field and the Druid Hills High School Field, lights along Starvine Way, Emory Experience Shuttles, concerts, study breaks (just to name a few).

SGA- the Student Government Association (www.students.emory.edu/SGA), the other cosponsor of this manual.

Sodexho – Emory’s Foodservice Provider

SPC- the Student Programming Council (www.students.emory.edu/SPC)

WPEC/WoodPEC- the Woodruff Physical Education Center (www.wpec.emory.edu); where many students work out.

WW- Wonderful Wednesdays- the revived Emory tradition of having fun every other Wednesday. Read more about it here: http://emoryhistory.emory.edu/enigmas/wednesdays.htm

“1462 building”- 1462 Clifton Road; where The Counseling Center is housed.

“1525 building”- 1525 Clifton Road; where Student Health Services is housed.

“1599 building” – 1599 Clifton Road; where Payment Services is housed.

This list is, by no means, an all-inclusive list. It is simply intended to make using the Eagle Source and working with student leaders & administrators a bit easier.

Have more alphabet soup? Make suggestions of other odd Emory acronyms that should be included by contacting Laura Reece at 404-727-6179 or by e-mail.
Emory has just over 300 student organizations that add to the life of our campus. Involvement in student organizations provides further opportunities for learning while you are a college or graduate student. As student leaders, you have already found value in at least one of our campus clubs.

We encourage student groups to collaborate with one another. Don't let your division/school limit you when looking for partners or co-sponsorships. It often adds to the quality of the event when several schools have input. Remember, graduates and undergraduates can work together to host an event. You can find a list of current organizations on the SGA (www.students.emory.edu/SGA) & OSLS (www.osls.emory.edu) websites. Contact Laura Reece at 404-727-6179 for more information on campus organizations.

The following organizations may serve as particular resources to many of your clubs and, hence, merit a brief introduction.

- **The Student Government Association** is the university-wide governing body representing all students in each division of the University. Although the day to day responsibility lies with each division, the SGA is also ultimately responsible for the chartering and funding of all student organizations. The SGA President is the elected emissary between the students and the administration. The SGA has Legislative Meetings on Monday nights in the DUC Faculty Dining Room and holds various committee meetings throughout the week. Students are always invited to any SGA sponsored meeting/event. The SGA office is located in suite 515 of the DUC. For more information you may also call SGA at 404-727-6179 or visit their website.

- **The Student Programming Council (SPC)** is the programming branch of the SGA. The mission of the SPC is to enrich the Emory community by providing a variety of quality entertainment for the university, making the Emory experience as enjoyable as possible. We accomplish this through the planning and execution of events throughout the year. We put on four big events every year: Homecoming Week, Fall Band Party, Spring Band Party, and Dooley’s Week. In addition to our big events, we also organize and cosponsor other events throughout the year. SPC accepts applications for membership in the spring and the fall, and membership is open to students from all areas of Emory University.

- **The Graduate Senate** (www.students.emory.edu/GradSenate) serves as a representative and advocacy body for all of the University’s graduate and professional students. Its primary function is to represent graduate and professional students in student government and to bring the concerns of those students to the attention of both student government and University administration. The Graduate Senate also serves as a vehicle for promoting communication and interaction among students from the various graduate and professional divisions.

- **Volunteer Emory** (www.volunteer.emory.edu) is part of the Office of Student Leadership and Service, located in DUC 340. To plan volunteer or service events for your group, visit Volunteer Emory. The student staff and director can help you find a project that suits your group’s interests, schedule and requirements. Service can be a great way to bond group members and connect to the Atlanta community.

- **College Council** (http://www.euturpe.com/cc/) is the student governing body of Emory College. Its main responsibilities include representing students’ concerns, allocating funds to more than 100 student organizations, and planning some of the largest events on Emory's campus each year. College Council meetings are open to the public and students are encouraged to attend. College Council meets on Wednesdays at 7:00pm in the Faculty Dining Room.
There are a wide range of graduate and undergraduate student organizations available to any student at Emory. Nevertheless, occasionally there is a desire to create a new student organization. There are some simple steps that, if followed, can make this process much less daunting.

Think carefully:
- Decide what the focus of your organization will be. How is that different from that of an organization which already exists? You can find a list of current organizations on the SGA & OSLS websites.
- Is it really necessary to create a new organization? Why? Having personality conflicts with the leaders of an organization that is similar to yours is not a wise reason to start a new organization.
- How can your organization change and grow over time and after you have graduated? You want your organization to adjust to the needs of the population. If it does not, it will likely not succeed.

Ready to act?
- Create interest about your organization. A few ways to do this would be by speaking to your friends, and friends of your friends, holding interest sessions, creating a LearnLink conference.
- Once you see the makeup of who is most interested in your organization, you will know which divisional council to speak with about getting a charter. All clubs must charter through one division or university wide organization. Chartering decisions are made by the individual divisional councils or the university wide organization.
  - What is a division? In this context, a division is simply the student leadership of a college or school within Emory University (eg: College Council, Medical Student Senate). There are 12 divisions. For a list of divisions, please visit the SGA website (www.students.emory.edu/SGA).
  - What is a university wide organization? A university wide division is the governing body for a university-wide organization (eg: Club Sports Council, Media Council). There are 5 university wide organizations. For a list of these, please visit the SGA website.
- If the majority of the members in your organization are within one school, you will need to make contact with the student government leadership within that school. For instance, if most of your members are from the Graduate School, you’d contact the leadership of Graduate Student Council; if your club’s membership were mostly comprised of members of Emory College, you’d contact College Council, etc.
- If your club seeks to serve all students of the university and has a mission that is in line with one of the university wide organizations, you will need to contact that university wide organization. For instance, if your club’s goal is to create a publication, you would contact the leadership of Media Council; if you wanted to create a competitive archery team, you would contact Club Sports Council.
- For a list of contact information for each division, visit the SGA website.

From this point...
- The basic requirements for chartering are: constitution/bylaws that include the university non-discrimination policy, membership roster with ten members, list of officers that must include president and treasurer, and a faculty of staff advisor. However, each division has their own steps for members within a new organization to follow. The time it takes to fulfill those requirements varies. Once you have fulfilled those divisional requirements, you have one more step to complete.
- In order to be an official recognized student organization, a request for a charter must be submitted to the divisional council or university wide organization. Your charter may be approved or denied by that body, and then it will be submitted to the SGA for final approval by the SGA Attorney General. The SGA website has more information on this process.
Each division has requirements for student organizations that the division has jurisdiction over. For example, College Council requires that its organizations attend council of president meetings and submit semester reports. It is the responsibility of the leaders of your organization to know what your division requires. Your division may also have different requirements depending on your charter type and whether or not you request funds.

In addition to your division’s requirements, SGA requires that:

- The president of the organization must re-register your club online immediately after elections have taken place within your organization.
- The President, Treasurer, and Additional Officer must attend a required training in the first week of the month after the officers take over the organization.
- A signed Advisor Agreement (online at www.osls.emory.edu) be submitted to the SGA office. Your organization must have a faculty or staff advisor. Advisors are of great benefit to the students that they work with. The topic of Advisors is covered in more detail in the next section.
- SGA requires a minimum of ten members for all clubs, but your division may require more. Membership rosters must be turned in each year during budgeting to keep your charter active.
- SGA does not determine how much money each student organization receives; the student leadership of each division/college decides how to spend the money they are allocated. SGA does, however, require all organizations to follow SGA and university policies. For example, student groups may not hold outside accounts or allow their funds to go negative without risking their charter.

Remember to have your President re-register as soon as he or she is elected.

Student Organizations must re-register their organization annually with SGA, immediately after the new officers have been selected and take office. The Student Government Association and the Office of Student Leadership & Service have launched a new online database management program. For the fall of 2009, all student organizations will be required to register their organization in August, and most likely, every organization will have to re-register again at some point this academic year when their new officers take over. For future academic years organizations must re-register immediately after the new officers take office.

Only the Student Organization’s current President may complete this online form on behalf of the Student Organization. In order to access the form, you must log in using your Emory ID and Password. When the President registers the club, he or she will provide three officers’ contact information, and those are the officers who are required to complete Student Organization Training Sessions. The required positions by SGA are President and Treasurer. The third position, called “Additional Officer” in the database, can be a co-president, chief event planner, or vice-president.

Be prepared – beginning January 2010, all organizations, when they re-register, will have to upload a current version of their Constitution. See more information in the Club Constitution sub-section of the Eagle Source.

The information you need may change, but to ensure you have all that you need to register, go to www.osls.emory.edu/studentorganizationregistration for complete directions and the link.
The Constitution of an organization contains the fundamental principles which govern its operation. The by-laws establish the specific rules of guidance by which the group is to function.

The process of writing and keeping a constitution current will serve to clarify your purpose, create your basic structure and provide the cornerstone for building an effective group. It will also allow members and potential members to have a better understanding of what the organization is all about and how it functions. If you keep in mind the value of having a written document that clearly describes the basic framework of your organization, the drafting of the Constitution will be a much easier and more rewarding experience.

When you were chartered, SGA required you to have a formal constitution. Bylaws are not required, but should be kept in the same document, at the end, as your constitution to ensure an organization keeps both on hand. Often, when organizations are not careful, they may lose their constitution, or fail to update it regularly. You should review your constitution annually. You can always contact the SGA Attorney General (sgaattorneygeneral@learnlink.emory.edu) for help with getting your constitution updated.

Additionally, a Sample Constitution with the required components is provided on page 73 of the Eagle Source to help you.

**REQUIRED TRAINING**

We fully understand that being an officer in a student organization is a time consuming, and sometimes daunting task. While there are numerous resources on campus at your fingertips, officers often do not know all the information that will help make them the most successful they can be. Because of that fact, Emory’s Office of Student Leadership & Service (the primary University departmental advising contact for all SGA student organizations), the SGA Business Office (the primary University departmental business and finance contact for all SGA student organizations), along with each of division of SGA, organizes and offers a required Student Organization Training. We can assure you this time will be invaluable to you and your success as a leader in your organization, and we promise to honor your time as you attend.

All Student Organizations must send a minimum of three officers to Student Organization Training.

- President
- Treasurer
- Additional Officer: This other officer can be the Co-President, Vice-President, or Chief Event Planner/Programmer for the organization.

These are the three officers that are listed on the Student Organization Registration form that is updated at least once a year by the newly elected president during the Re-registration process, immediately after new officers take over the organization. The officers do not have to attend the same session, but should attend a session during the
first week of the month after they take office. Usually multiple sessions will be held, and the schedule can be found at www.osls.emory.edu/studentorganizationtraining.

Keep in mind, these sessions are open to ANYONE in an organization that would like to attend, including your advisor; however, it is required for the President, Additional Officer and Treasurer.

Each officer must be trained only once during his/her term, but must be retrained each year if he/she holds a position again (as policies and challenges change and arise yearly). When an organization selects new officers and immediately re-registers the organization, the newly elected officers must be trained at the next available training after taking office.

In order to ensure that students are trained, several privileges will be withheld until the three designates from each student organization attend a session. Once an organization registers their new officers, those officers must attend the next available training session in order to ensure these privileges are not revoked for their group.

1. No student organization can receive his/her budget in September unless the Treasurer has been trained.
2. No student organization can have a contract signed by a University Employee unless all three officers have been trained, and students can never sign contracts.
3. No student organization can request co-sponsorship with a University Campus Life department.
4. No student organization can request supplemental funding from their division or from SGA unless all three officers have been trained.

Your Primary Advisor must be a full time faculty or staff member at Emory. Clubs may have a graduate student or alumni as an additional co-advisor.

All student organizations are required to have a faculty or staff advisor. Each spring, or whenever your organization holds elections, you will be required to re-register your organization online and to submit an Advisor Agreement form to the SGA Office (this form can be found at www.osls.emory.edu).

Student organization advisors encourage students to become accountable and responsible for their actions within an organization. Advisors attempt to educate students in the area of programming with regard to planning, evaluating, and developing activities. They also advise student groups about University procedures.

While advisors are available and willing to help student organizations, the management of the group remains with the student leaders. Advisors will offer suggestions, make recommendations, provide students with resources, and act as consultants in their specialized areas, but they should not be responsible for doing work for the students, managing funds, or signing contracts for the organization.

Advisors should...

- Communicate with his or her student organization, at least once per semester.
- Role model honesty and integrity by following established laws or procedures.
- Provide feedback or help the group develop their own opinions about actions or events.
- Share knowledge of University policies, resources and relevant past
experiences. Be available to the group you advise.

- Remember that the management of the group (programmatically and financially) remains with the student leaders within the group. Advisors can offer suggestions but they should not be responsible for doing work for the students, signing contracts for the organization or have a prominent role in any of the finances.

Please remember that Advisors are here to be guides and help you think through the ramification of decisions. Your Advisor wants your organization to succeed. There are many easy ways that you can maximize your relationship with your Advisor. Visit the OSLS website for more information: [http://www.osls.emory.edu/your_advisor.php](http://www.osls.emory.edu/your_advisor.php).

**Tips for A Good Relationship with Your Advisor**

- Meet with them and set a clear direction for the roles and expectations. This is incredibly helpful, as it makes it clear what you want and hope from them. You can’t get upset with your advisor if you haven’t explicitly asked for what you need.
  - Advisor Agreement Form can help begin the conversation about expectations – Due to SGA Office ASAP!
- Learn from them – the most important reason for having an advisor is to enhance the learning opportunities associated with student involvement. More than likely, they’ve been here a while and understand the climate and culture of the institution, along with policies and potential issues that may arise.
- Include your advisor - Make them feel welcome at meetings and events – go to lunch with them to get to know them better and add them to your listservs and conferences
- Request One-on-One meetings - Communication is key, and electronic modes don’t always cut it...
- Find a New One – If your advisor has been missing in action, and you have tried to have a meeting with him/her to discuss his/her involvement, do not be afraid to pursue a new advisor relationship. Be careful, as you do not want to burn any bridges....also, some groups do not have an option as to who their advisor is, but many do...talk to someone in the OSLS if you have an issue...
- THANK THEM! – Appreciation – they are, after all, volunteering to do this work 😊

**Why do you want a good relationship with your advisor?**

- They can help make sure you don’t mess up – often they know policies better, perhaps have influential relationships with other people on campus, or have seen major issues at other events or with previous officer administrations
- Organizational Life Cycle – They’ve Been Here Longer – If you think about it, every two to three years, major leadership in a student organization is gone, and a new day begins. Sometimes, this is good – provides for change and growth. But sometimes it is negative when the organization tries to “reinvent the wheel”
- Serve as an impartial third party – help mediate disputes between members
- Assist with evaluating the organization’s work – they can be an “outsider” on the “inside” to provide you a different view of the work you are doing
- Future Recommendations and Award Nominations – everyone needs a recommendation at some point in their early career!
- Career Networking – you are probably involved in your organization because it interests you, and some of the work you are doing could be beneficial in a career down the road! Take advantage of your advisor’s network! But you can only do this if you get to know your advisor, learn from them, and involve them!

**A good relationship with your Advisor is essential for a successful organization.** Invest a little time cultivating that relationship with your Advisor and you will be able to make this relationship more successful than you can imagine. Your organization has everything to gain!
The Office of Student Leadership & Service has a resource booklet for advisors. If you need help working with your advisor or help finding an advisor, please contact the SGA office at 727-6179 or check the OSLS website at www.osls.emory.edu/

**Computing for Student Organizations**

Remember to conduct yourself in a professional manner when corresponding about your student organization. Emails about organization business should have a different tone than e-mails back and forth between your friends. Be respectful- do not blast LearnLink conferences or send mass messages about your group without the appropriate permissions. Technology is a big part of life at Emory and can be extremely helpful for your organization. Remember to use it responsibly.

**LearnLink**

Any organization may request a LearnLink conference but only chartered groups may request a conference that gets created against the public server quota. This means that the disk space used by the conference will not count against the controller’s user’s quota. Chartered student groups should NOT create conferences or sub conferences on a user desktop but should request conference creation by e-mailing learnlinkinfo@learnlink.emory.edu

For more information on LearnLink, special features, controlling a conference, etc. open the Technology Info conference in LearnLink.

**Websites**

Student organizations that are 1) perpetually-chartered by the Student Government Association (SGA); 2) active fraternities or sororities; or 3) departmentally-sponsored with a faculty or staff advisor are eligible to receive server space on [http://www.students.emory.edu](http://www.students.emory.edu) to host web pages related to the organization. For complete information on using the student web service for your website, please view [http://it.emory.edu/showdoc.cfm?docid=1586](http://it.emory.edu/showdoc.cfm?docid=1586). The issue of student groups is discussed under FAQ. A student website can be requested and ownership may be changed through the online helpdesk at [http://help.emory.edu](http://help.emory.edu).

**Blackboard**

The Emory University Blackboard server at [http://classes.emory.edu](http://classes.emory.edu) is an ideal place for student groups to store and manage documentation and workflow in their organization. A basic template can be used for required documentation relating to the charter, minutes, and bylaws. Any chartered student group wishing to request space on Blackboard should go to [http://classes.emory.edu](http://classes.emory.edu) and fill out the organization request form found under the "Help and FAQs" tab.

**Ethical Decision Making**

The success in leading your Student Organization will mostly be determined by your ability to face adversity and make ethical decisions in all, but especially tough, situations. To help give you some guidelines to think about, here is some basic information. Feel free to contact someone in The Office of Student Leadership & Service should you have any questions or any challenges that arise. Also be sure to engage your advisor to assist with any ethical dilemmas, and trust his/her advice.
**Integrity:** is an *internal* system of principles which guides our behavior. The rewards are intrinsic. Integrity is a choice rather than an obligation. Even though influenced by upbringing and exposure, integrity cannot be forced by outside sources. Integrity conveys a sense of wholeness and strength. When we are acting with integrity we do what is right - even when no one is watching.

**Ethics:** is an *external* system of rules and laws. Usually there are rewards when we follow the rules and punishments when we break them. A professional board or committee often monitors compliance. Many organizations have developed a code of ethics that employees are expected to obey.

At Emory, one of our strategic goals is to develop Ethical Leaders. We believe that one of the key places you will learn ethical leadership is through your involvement in a student organization. As leaders, we expect you to act with integrity and follow basic ethical guidelines when making decisions. People of integrity are guided by a set of core principles that empowers them to behave consistently to high standards.

**Integrity** is about developing congruence between your values and your actions

\[
\text{VALUES} = \text{ACTIONS} \rightarrow \text{INTEGRITY}
\]

When your values and actions are in alignment, then you are congruent and you are living with integrity.

Realizing your values requires much self-awareness, which is gained over time and through purposeful reflection about who you are, what you believe in, and what you stand for.

- **Commitment** – First, you must discern what your core values are, and commit to follow them.
- **Congruence** – Secondly, you must develop the ability to be congruent. Such behavior involves discipline, strength, and moral courage. It is a lot easier to talk about what we believe in than to live it out, day after day.
- **Complexity** – we understand that situations are complex, but that we must act within our own values, regardless of how difficult the situation may be.

These six core ethical values have been identified across cultures and age groups as critical to the functioning of ideal communities and societies. They are called the “Six Pillars of Character.” **We challenge you to spend time thinking about what these “External” Ethical Pillars mean to you, internally.** How will you develop integrity (inner congruence) around each of these external ethical principles?

1) Trustworthiness
2) Respect
3) Responsibility
4) Fairness
5) Caring
6) Citizenship

**“DRIVING YOUR ORGANIZATION”**

You are in the driver’s seat of your organization. In choosing to become Student Leaders, you’ve chosen a role that can be filled with great reward as well as great responsibility. One of those responsibilities is casting the vision for your organization and taking the time to set goals and plot a course that will help you accomplish what you have set out to do.
As the leaders of your organization (Presidents, Chief Programmers, Vice-Presidents), you are in the driver’s seat of your organization. True - There is usually only one driver’s seat in a car, but organizations are very different. There may be a “lead” driver called a President, but you really are all on the same team to get you to your destination, or your vision. So follow us on a quick journey through some basic “best tips” to think about when “Driving your Organization.”

While the process arrow above moves from Expectations to Visions, the vision is the first thing you should write. In this analogy, let’s think of Expectations as the means, or the vehicle, to reach a destination. So expectations are your “car.” Vision is your ultimate destination. So in order to get started on your journey, you have to know where you are going, right? Therefore, we are going to start with our vision and work backwards...

VISION
Where are you going? What is your destination? And we use “Your Destination” in the plural sense – where does the organization want to go, not just where does the President want to go?
Visioning includes writing 3 statements
- **Vision:** Where do you see the world, or your community, as a result of your organization? What is the long term direction of your organization?
- **Mission:** Why do you exist? Why does your organization exist?
- **Purpose:** Why is your mission important?

GOALS
If you are going on a long journey (and you are, since your vision includes several years), you have to have a plan for how to get there. Not the specific roads you will take necessarily, but some achievable mile markers. If you are driving from Atlanta to Seattle, your goal may be to make it to Memphis by day one, Des Moines by day two, and so on.

Goals are where you can think in terms of “this year” or even “this month.” Goals entail making decisions about what exactly you want to accomplish in a specific period of time. Your vision should be something that can’t realistically be accomplished in one year’s time. So, as the leader for this year, you’ll need to decide what steps you can accomplish toward the fulfillment of that vision in the limited time that you have. It will be up to future leaders in your organization to pick up where you’ve left off, and you’ll want to groom them to stay on track and be truthful to the core values of the organization. In the business world, they call that succession planning, and it’s another key leadership skill.

First, Identify your Strengths, Weaknesses, Opportunities, and Threats. As a team, brainstorm what are the strengths of your organization, what weaknesses need to be overcome, what major opportunities do you have lying before you, and what are the major threats to your success? After doing this together, set your goals according to those strengths, weaknesses, opportunities, and threats. Each goal you set should have 5 major characteristics...
- **Specific:** be clear about what you hope to accomplish
- **Measurable:** you have to know when you’ve reached it
- **Attainable:** you have to be able to reach them, and know the steps to reach them
- **Realistic:** you must be willing and able to get there
- **Timely:** set dates and deadlines

AGENDAS – For the Year and For your Meetings
Now that you know your mile-markers, you have to determine your route. The Agenda is the roadmap. For simple trips, you may begin your journey and know exactly how to get there. Relating this to student organizations, you may be able to plan a very simple bonding event after a meeting – say arranging quick reservations at a restaurant for your organization so you can go get to know each other better.
If you are going on a road trip, and taking people with you, wouldn’t you normally share at least a little about where you are going? That is why Agendas are such an incredibly important component of a meeting as well.

- Set Agendas for the year, and set them for each meeting
- Share them at each meeting – put them on the board, or bring a copy – or at least email them ahead of time so people know where you are going
- Identify priorities – priorities at the top of the agenda – people zone out after a while...
- Identify presenters – give people a heads up that they are presenting/leading a conversation
- Identify time-limits – Stay on track and honor your attendees’ time

For meetings, have a time “For the good of the order” in order to help build relationships, let members have a voice, and get to know each other better. “For the good of the order” can be business, or it can simply be a fun story about how someone’s week has been going.

**EXPECTATIONS**

Lastly, Expectations are your Vehicle – the means to reach your vision. For this trip, our means to reach our destination is the little car, and there are some pretty clear expectations you have of your car, right? We basically expect that it runs, that it cranks, etc... Perhaps for some more “advanced” destinations we borrow our friends car, because we may need to expect more (perhaps that the radio works or that the air conditioning works). Maybe even we do cash for clunkers trade in to get an “upgrade,” but either way, we have to have some basic expectations that will ensure we get to our destination.

In your organization, you need to be clear and on the same page about what your expectations are from your officers, and from your members. And you all need to be on the same page about them. Here are some tips to setting clear expectations of your members. Some may be simple: 1) they are on time, 2) they do not miss meetings, and 3) they meet with the advisor weekly. Some may be more in-dept: 1) each member is expected to raise a certain amount of money, or 2) each member is expected to represent the organization in a certain way when meeting with Administrators.

It is important to set Shared Expectations – do them as a group, don’t just “hand them down” from the executive board...

1. Start with a vision of what the result should be – SHARE YOUR DESTINATION and where you hope to go this year. Allow others to share their vision, and build a consensus around the new directions of the organization. Don’t just “hand down” the expectations, unless you have to (maybe like an attendance policy).
2. Next, define “Excellent Performance.” Make it clear to every member what is expected of them – from attendance to communication to following through on responsibilities
3. Put them in writing, as a group – and post them so people know where they are and can refer to them regularly
4. Give and receive feedback, and revisit them often – don’t let expectations sit stagnant. Since you all reached them together, as a group, then everyone made a “deal.” If people are not holding up to their end of the deal, let them know that.

**CARING FOR YOURSELF AND YOUR MEMBERS**

**SELF-CARE**

As student leaders you may stretch yourself a little thin and try to “run on fumes” at the busiest time of the semester. However, you are still mere mortals and you do need to sleep, eat, exercise and relax on occasion.

- Get a flu shot! This year it is especially important to get both a seasonal flu shot and the H1N1 sequence when it becomes available. Just like they say on the plane – put on your own oxygen mask first before helping others. If, as a student leader, you get sick, you’re going to have to take a time-out while you recover. So, do what you can to prevent illness and take care of yourself.
The Eagle Source: A Guide for Student Organizations

- You can make a free, confidential appointment with one of our health educators to discuss self-care strategies in more detail. Look for us online in Your Patient Portal at studenthealth.emory.edu.
- General words to the wise to keep yourself performing well in- and out-of the classroom:
  - Sleep 7-9 hours per night. If this is a challenge, check out the SHCS website at [www.studenthealth.emory.edu](http://www.studenthealth.emory.edu) or download the podcasts for more info.
  - Eat meals throughout the day that contain protein, carbs and a little fat. Fat (in the form of peanut butter, cheese, avocado, etc.) helps us feel full. Protein fuels us and helps build muscle (meat, beans, nut butters, eggs, etc.). And carbs give us energy (try whole grains whenever possible: cereals, pasta, bread). By being sure you have a blend of protein, carbs and fat at each snack or meal, you will avoid the energy spikes and crashes so common with less appropriate eating. Contact Carol Kelly (ckelly3@emory.edu), our dietitian, for more information.
  - Be sure to stay hydrated with water. (And the water in your coffee doesn’t count!) Our mental and physical performance is very dependent on water. And, keep in mind that sometimes when we feel hungry, we’re really just thirsty. Try drinking some water, if you are still hungry – have a balanced meal or snack.
  - Do something you enjoy at least once each day – call a friend, pray, watch the sunset, whatever. These stress-breaks will help sustain you for the long run.
  - Avoid overdoing it with caffeine, alcohol, tobacco or other drugs. If your relationship with alcohol or other drugs is becoming abusive, kick ‘em to the curb - we can help – call 404-727-7551 and ask to speak with Willie Bannister or Virginia Plummer.
  - Count your blessings. Having a positive attitude can help you stay healthy, it also rubs off on your friends and your group members!
  - Nurture positive, caring, mutual relationships. Chat with Shirley Banks or Aline Jesus Rafi to learn more about building healthy relationships.

WATCHING OUT FOR YOURSELF AND YOUR ORGANIZATIONAL MEMBERS

The mission of Emory University Student Health and Counseling Services is to empower students to take responsibility for their health and to complement the academic mission of the university by providing unified medical, counseling and health promotion services that result in a healthy campus culture. Student Health and Counseling Services is committed to providing caring professional clinical services to a diverse student body and to reducing the stigma associated with seeking mental health services.

As a leader in your organization, it is important that you pay attention to yourself and your members. It is not your job to be a counselor, or a doctor; however, simply knowing the resources at your fingertips to help you and your friends is important. SHCS is an excellent resource for you!

Student Health Services and Health Promotion offices, as well as psychiatry, are located in the 1525 Clifton Road Building, 1st and 2nd floors. They provide outpatient primary medical care for students when they are sick but also help students stay healthy with services in nutrition, sleep, healthy relationships and sexuality counseling, alcohol and other drug counseling, smoking cessation, stress management and more! Call 404-727-1697 for more information.

The Counseling Center is in a new location. They are now in 1462 Clifton Road on the 2nd floor. They offer individual, group and couples therapy.

- Student Health Services appointment line, including after-hours physician-on-call: 404-727-7551
- Health Promotion: 404-727-1697
- Counseling Center appointments and after-hours information: 404-727-7450
- EPD and EMS: 404-727-6111

For the most Up-to-Date Information Sheet from Student Health and Counseling, visit: [http://studenthealth.emory.edu/hp/health_ed_resource_sheet.pdf](http://studenthealth.emory.edu/hp/health_ed_resource_sheet.pdf)
Next to Recruitment, Elections are the single most important function of an organization. Elections insure the sustainability and life-blood of your organization. Here are some tips to help you through this process.

- Re-read the Ethical Decision Making section in this Eagle Source
- Follow your constitution. Letter by letter.
- Read the elections procedures allowed during the elections meeting
- Have your advisor present to help coordinate elections
- Plan an effective Transition Process. Ensure that new officers are fully equipped to be successful. Do not disappear immediately after you finish your term, and do not gradually disappear even before your term is over.
- Keep records to pass down from one officer to another.
  - LL Conferences are Great, when organized, so spend time being purposeful about organizing emails, the titles of documents, etc...
  - Keep a “Officer Folder” full of information about your role
  - Encourage ALL of your officers to do this
- Remind the new President to Re-register and remind the new officers to go to training.

Follow the procedures in your Constitution to the letter!
The Eagle Source: A Guide for Student Organizations

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EVENT PLANNING - WHERE TO START

STEP ONE: SECURE FUNDING

The Office of Student Leadership and Service is always available to assist you with event planning. We recommend that you allow plenty of time to plan your events and suggest one month as the minimum lead time for most all events. As you start to consider topics, dates, and locations remember to be mindful of others programs. Organizations should take care not to over program the campus and should not schedule large non-religious events on major religious holidays. Check out the new university calendar at http://www.emory.edu/home/events/ to see what is happening and/or post your event.

You should also consider your target audience when planning the event time and location. Students in various schools often have different class schedules and breaks. If your program is outdoors it is recommended that you also reserve an indoor site as a rain location.

Student Organizations are completely responsible for their events from planning and set up to funding, execution, and clean up. Please make sure that you have the people power and finances to hold the event before you make any commitments.

RESERVING SPACE ON CAMPUS

Emory University expects that faculty, staff, student employees and student organizations will not misuse privileges for access to university space and services inappropriately. All spaces on the Emory University campus that can be reserved, and allow for public access are to be used for university events and organizations. If a non-university group or company of any type contacts your student organization about "co-sponsorship" for access to space or services, please contact Meeting Services (404-727-5355) for guidelines and policies. As a sponsor, you must be in attendance and will be responsible for the event and any associated charges.

Meeting rooms are available for chartered student organizations to utilize for meetings and programs. Many buildings have conference rooms, classrooms and auditoriums that are available after the class day is complete. Most facilities are available for no cost; cancelation and no show fees may apply, however, if clubs neglect to cancel unneeded spaces according to the specific policies.

Reservations must be made at least 7 days in advance. Below is a list of contact numbers you can use to reserve space all over campus. Each building has its own policies which you are responsible for knowing and following.

When possible we have included a link to the particular policies and/or online reservation system. Meeting Services (http://www.emory.edu/DUC/meeting_services.php) handles reservations for a large part of the university; in the following sections you will find information on reserving through the DUC Meeting Services Staff. To see spaces/events scheduled all over campus visit http://r25pweb01.cc.emory.edu/

<table>
<thead>
<tr>
<th>FACILITY</th>
<th>PHONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Space (most buildings- weekdays until 6pm)</td>
<td>727-6042</td>
</tr>
<tr>
<td>Candler School of Theology</td>
<td>727-0792</td>
</tr>
<tr>
<td>Carlos Museum Reception Hall</td>
<td>727-0516</td>
</tr>
</tbody>
</table>

Do not reserve space under your organizations name for any other department or group.
Meeting Services is located in DUC 220 and handles the reservations for many campus spaces including the DUC, Cox, and many academic buildings. They also reserve special spaces such as Lullwater Preserve, Glenn Auditorium, Tull Plaza, and the Asbury Traffic Circle. Late night reservations have special requirements and student groups interested in planning a late night event should work with Meeting Services to make sure that all policies and procedures are understood and followed.

Meeting Services requests that you make your reservation requests at least 7 days in advance. All events with catering, alcohol, or AV needs should be reserved at least two weeks in advance. Meeting Services requires that all cancelations take place with at least 2 days advance notice. The space for which you have committed is difficult to reschedule without sufficient advance notice so cancellation or no show charges may be applied if clubs neglect to cancel unneeded space according to the specific policies. You will need your student organization’s Smartkey number in order to reserve space through meeting services so make sure you have that information available.

Visit their website to read more about their policies, fees, and spaces. You can also download the pertinent space reservation forms and see what events are scheduled for any given day. Chartered clubs may also make their space reservations online through Meeting Services or simply use “student” as the login and password when making online reservations. Visit www.emory.edu/DUC and use the Meeting Services tab to schedule reservations online. Many Meeting Services forms are also included in the Forms Section on this document.

The Meeting Services Staff
Andrea Lentz (andrea.lentz@emory.edu) 7-5355 Large DUC spaces, Dining Rooms
Amber Herring (aherri3@emory.edu) 7-1706 DUC Meeting Rooms
Janell Goodwin (Janell.goodwin@emory.edu) 7-5354 Academic Spaces (M-F 6pm-12am; Sat-Sun 8am-12am)

To reserve a room within the Dobbs University Center or the Outside Terraces, stop by DUC 220, or download a form online at: http://www.emory.edu/DUC/printable_forms.php.

Reservations are made through Meeting Services (http://www.emory.edu/DUC/meeting_services.php) and must be made at least 7 days in advance. The Meeting Services website also lists the available rooms, their occupancy capacities, special features, and even includes photographs. Take note that food should be ordered from Emory.
Catering (404-712-8948) when reserving the Faculty Dining Room or Winship Ballroom. Also keep in mind room 251 may be used as serving area for room 250, and must be reserved. Under special conditions, the DUC is also available for late night programming. For additional questions, contact the Dobbs University Center, Meeting Services at 404-727-5355 or 404-727-1706. For your convenience, a space request form can be found online at www.osls.emory.edu.

Cancellations
In the event that you must cancel an event, you may do so without charge if you cancel meeting rooms more than 48 hours before the event is scheduled. In the case of dining rooms, the Commons, the Faculty Dining Room, the Winship Ballroom, or the Harland Cinema, you must cancel your event at least 7 days before its scheduled date. If you do not cancel or cancel closer to the event, a fee of $20 will be charged. Large events with special setups carry a $50 fee for late cancellation or no shows.

RESERVING SPACE AT COX HALL

Reservations for Cox Hall are also handled through Meeting Services (http://www.emory.edu/DUC/meeting_services.php) or 404-727-5355). A reservation form can also be found at www.osls.emory.edu.

Ballrooms
Reservations of any of Cox Hall’s Ballrooms must include food that must be catering by Campus Dining (404-712-8948). Ballrooms at Cox have varying capacities ranging from 30 to 390. Check the Meeting Services website for more information on features and capacities.

Traffic Circle
The Traffic Circle at the intersection of Asbury Circle and Dickey Drive can be reserved by sanctioned Emory student organizations or Emory departments for special event with the following guidelines:

1. Reservations should be made through Meeting Services at least two weeks prior to the event. A rain location plan should be made at the time of the reservation. For your convenience, a space request form has also been included at www.osls.emory.edu.
2. Cancellations should be made at least 24 hours in advance to avoid a cancellation fee of $40. In the event of rain, no charge will be assessed. In the event of rain no charge will be assessed.
3. The coordinator must supply Meeting Services with written details of the event at least 48 hours prior to the event. Failure to provide this information may result in cancellation.
4. The person submitting the reservation MUST be present for the duration of the event.
5. The Traffic Circle is a public space and no exclusions can be made to individuals wishing to participate in the event.
6. Any damages or excessive clean up incurred as a result of the event will be billed to the Smartkey number on the reservation form.
7. No glass containers, animals, or fire of any find may be a part of the event.
8. No tables, inflatables or other large structures may be placed in the street. EMERGENCY VEHICLE MUST HAVE ACCESS AT ALL TIMES.
9. Due to construction, handicapped persons who park near Anthropology and Tarbutton MUST be allowed to come and go through the Traffic Circle as this is their only route.
10. No alcohol, gambling or raffles allowed.
11. Any streamers, balloons, or other decorations must be removed as the close of the event.
12. No loud music after 10pm.
13. Any food must receive prior approval through Foodservice Administration at 404.727.7463.
14. Any tables, chairs, trash cans, or electrical needs must be arranged ten days in advance thorough Customer Service at 404.727.7463.
15. Notify Emory Police two weeks prior to your event, and again 28 hours in advance of you event at 404.727.8005. Inform them of the details of your event and discuss any gate access or other safety issues.

Tables at Wonderful Wednesday can be arranged thru the WW LearnLink conference. Contact Meeting Services if you do not have LearnLink but would like to participate in Wonderful Wednesday.
Cancellations
There will be no charge to cancel an event at Cox Hall if the event is cancelled more than 14 days before it is scheduled. Cancellation of any room in Cox Hall less than 14 days before the scheduled event may result in charges. Contact Emory Catering at 404-712-8948 for details regarding catering.

RESERVING ACADEMIC SPACES

There are many academic spaces that can be utilized by student organizations and departments for little or no cost. Academic spaces refer to rooms that are set aside for classes on weekdays and are, hence, not generally available for reservation Monday through Friday before 6pm. Some spaces can be reserved through administrators within the specific school; others can be reserved through DUC Meeting Services. Spaces reserved through Meeting Services are only available Monday through Friday 6:00pm-12:00am and on Saturdays and Sundays from 8:00am until 12:00am. To look into reserving those spaces at other times, contact the Registrar at 404-727-2810. Remember, each location will have its own rules, procedures, and regulations which you are responsible for knowing and following. To see events scheduled all over campus and schedule your own visit http://r25pweb01.cc.emory.edu/

Please note:
- Audio-visual equipment can be reserved through Classroom Technologies at, 404-727-6853. Some schools may also have their own AV equipment available for your use; check with your reservationist.
- Special parking needs should be addressed through Parking Services at, 404-727-PARK

FUNDRAISING & DONATIONS

Student organizations at Emory University may have a need to raise funds for their organization. Student organizations that have been recognized by the SGA have this ability but:
- Your divisional treasurer must approve all fund raising events.
- All organizations must be able to cover any initial expenses necessary to hold said fundraiser.
- All money must be deposited into your fund(s) with SGA. Outside accounts for student organizations are not allowed and may result in loss of charter.
- Raffles, gabling and games of chance are prohibited by state law.
  - If you want to encourage donations by offering a chance to win a prize, all individuals must be able to enter, whether they make a donation or not.
- Student organizations may be allowed to obtain a corporate sponsorship or in-kind donations from for-profit companies or businesses in limited situations. If your group is interested in this, please contact Rich Porter (rich.porter@emory.edu) at (404) 712-4682 to make sure that any such agreement would be beneficial to your group.
- Approval for fund raising activities off-campus is required. Contact Rich Porter (rich.porter@emory.edu) at (404) 712-4682

Tabling to raise funds for your organization, or your organization's event?
- Have colorful & clear signs that tell people the name of your organization and the purpose of your fundraiser.
- Be creative with your advertising about your fundraiser. Can you find a fun or unexpected way to tie the theme of your fundraiser in with your advertising?
- Draw attention to your table and cause, without interfering with the normal operation of the university. Simply sitting at a table and doing your homework will not attract the attention that your organization wants.
Trying to get goods donated?
From time to time, organizations may find it necessary to try and get goods or services donated. This happens most often when goods or services are used as prizes in conjunction with raising money for a specific cause, or organization. If you would like to have goods or services donated for a specific event from a for profit business, please contact Rich Porter (rich.porter@emory.edu) or (404) 712-4682 to make sure that any such agreement would be beneficial to your group.

CO-SPONSORSHIPS

There are various opportunities for co-sponsorships around campus and among your fellow student organizations. You never know who will agree to co-sponsor your event so cast a wide net when looking for co-sponsors. Here are a few co-sponsorship opportunities through university departments.

DUC Program Co-sponsorships
Through productive partnerships, the Dobbs University Center (DUC) will strive to be the primary student-focused center on Emory’s campus. In keeping with this vision, we encourage student groups to bring programs to the DUC which are open to all Emory students. The following information is offered to help you decide whether to request a co-sponsorship.

Resources provided by the DUC
Because we hope to effectively leverage our limited resources to create programs, the DUC will share in the costs associated with events. The current limits for funding to cover food costs or performer’s fees are listed on the Request for Co-Sponsorship with the DUC. It is possible that non-cash support (audio-visual and other equipment, marketing, support, etc.) may equal actual funding provided. Potential resources include:

- Technical equipment and support
- Logistical support/staffing
- Marketing and outreach assistance
- Financial support for food and/or fees

Criteria for co-sponsorship
1. How does the program contribute to the DUC’s vision?
The sponsor must be offering a program contributing to community-building, and which could be deemed to be of general interest and open to all (we will not support a recruitment party for a group, for example). Most groups approved have been chartered student organizations; however, programs proposed by other groups may be considered.

2. Has the group received co-sponsorships support previously, and with good results?
Typically, the DUC will consider no more than one co-sponsorship request per month. Attendance figures and other evaluative data are likely to be requested.

3. Does the group demonstrate effective program management expertise?
Advance planning and time management skills (for logistical and marketing plans) are of particular interest. We expect to have sufficient lead time to effectively market events resulting from co-sponsorships.

4. What is the amount of funding being requested and how will it be used?
How are the requesting groups’ resources being used?
We anticipate that the requesting group will provide the majority of funds required.

DUC staff assistance with the event
Marketing: DUC staff may assist with posters, table tents, banners, and/or video board messages. We prefer that groups forward jpg files containing promotional material. Given sufficient advance planning, we can place a link on the DUC’s website for the program.
Logistical/event support: Special assistance in obtaining the appropriate space, distributing event tickets, and providing one or more staff to help on-site in managing the event are possible.

What DUC Co-Sponsorship Does NOT Entail:
1. Leadership in the planning of the event/program.
2. Printed materials (event programs, name tags, etc.).
3. Handling of invitations or R.S.V.P.s for the event.

Procedures for requesting co-sponsorship
We ask that you submit your request no later than one month before the event date. The following is the procedure to request co-sponsorship:
1. Review this document carefully, then complete the Request for Co-Sponsorship with the DUC form (www.osls.emory.edu) and return it to Stanley Taylor; DUC Operations Manager, via e-mail (sjtaylo@emory.edu), fax (404 727-5318) or inter-office mail (Drawer AAA).
2. The departmental team will review your request and communicate with you within seven to ten days of our decision.

Sodexho Food Co-sponsorships
We have good news to share with you! Our colleagues in Sodexho and the Food Services Liaison Office are offering co-sponsorship to student organizations on food related charges! Based on your application, we will distribute up to $250.00 for food purchases to student organizations for programming to the University community. Applications will be considered until the $10,000 fund has been exhausted. The application form is included on page 86. There is one hitch, PLEASE NOTE: YOU MUST SUBMIT YOUR APPLICATION 3 WEEKS IN ADVANCE. If it comes to us with less time, it will not be considered.

This is an exciting opportunity provided by our food service provider to assist student organizations in planning outstanding programs that benefit the entire University by covering some of the associated costs. Programs must be applicable, open, and advertised to all students, graduate and undergraduate, without limitations on who can attend. Please make sure that your student organizations are aware of this wonderful new service!

Send applications or questions to Laura Rogers Reece (lroge01@learnlink.emory.edu) in the Student Government Association office. She can also provide you with a Student Catering Guide, which should give you a picture of the food services that are included in this co-sponsorship opportunity.

OMPS Co-sponsorships
The Office of Multicultural Programs and Services (OMPS) co-sponsors numerous events with various campus organizations throughout the year. If your organization is planning an event, please download the Intercultural Initiative Grant & Sponsorship Form (http://www.emory.edu/MULTICULTURAL/cosponsorships/index.html) or contact the office at 404/727-6754.

Purpose
OMPS Intercultural Initiative Grant & Sponsorship is available to Emory University’s recognized student organizations to support programs and events that fulfill one or all of the following objectives:
• fosters diversity education
• cultivates cultural awareness
• encourages avenues for cross-cultural dialogue and interaction.

Tips on Cosponsoring with OMPS
• It is STRONGLY recommended to submit a request at least one month in advanced of the scheduled event date. Requests must be received a minimum of 2 weeks prior to the proposed date of the program/event.
• Submit an itemized budget. The more specific the budget and allocation of funds, the more likely your organization will receive your requests.
• Make sure your organization belongs to or is active with the Multicultural Council and/or its affiliate organizations.
• Have multiple co-sponsors for your event, not just the OMPS.
• After your event, turn in your Programming Evaluation Form.

The organization must agree to submit a completed Program Evaluation form for follow up and future programming purposes. This should be submitted at least one (1) week after the program/event.

All Requests should be submitted to:
Office of Multicultural Programs and Services- DUC 425
Please contact us with any questions: (404) 727.6754 or omps@learnlink.emory.edu

OSLS Co-sponsorships
The Office of Student Leadership & Service co-sponsors activities with student organizations. If your organization is a registered student organization and you would like to get more on-campus visibility about a specific program you are sponsoring, this opportunity may be for you! We have an extremely limited amount of funds set aside to work with all student organizations.

Our co-sponsorships generally fall into 2 categories: events that occur as part of our Fridays@10 programming series, and events that occur on other days and times.

To request co-sponsorship:
1. The Student Programming Council coordinates the selection of events to be a part of the Fridays @ 10 program. Visit www.students.emory.edu/SPC for more information. Applications are required.
   o Fridays at 10 programs must:
     ▪ Take place during a Friday during the academic year;
     ▪ Event must be alcohol free and begin at, or after, 10:00pm.
2. Email your other request to Cynthia Shaw (cshaw@learnlink.emory.edu)

Your request should contain:
• A brief description of your event, including the purpose and goals of the event;
• The time and date of your event;
• A statement of what specific financial, or in kind support your organization needs.

If we agree to co-sponsor your event, we will:
• Assist you with the cost and promotion of your event;
• Require that our office name be placed on any materials that are produced in association with this event.

Your request must be made well in advance of your event. Consult the Small/Medium Event Planner or Large Event Planner for guidelines on requesting co sponsorships. Priority is given to Fridays@10 programming and events produced by more than one student organization.

USE OF EMMY LOGO

Use of Emory’s name, logo or marks in any commercial setting requires prior approval from Emory. Requests for such approval should be submitted to the Vice President for Communications, and a decision will be made in conjunction with the Office of the General Counsel. For more information, contact Ron Sauder at 404-727-4499 or rsauder@emory.edu. Using the letter E.U. or the depiction of Dooley does not require permission.
PLANNING & MANAGING YOUR EVENT

All events are different but here are some general guidelines to keep in mind depending on the size of your event:

**Small Scale Events** include fundraiser events, workshops, training activities, tabling for recruitment and information distribution, trips for members of your organization, and/or performance showcases. These events usually take 3-4 weeks to plan. Make sure that your treasurer is involved with planning your event. Feel free to use the Small/Medium Scale Event Planner & the Program Budget Worksheet (on pages 78-81) to assist you in the creation of a successful event!

**Medium scale events** may require some security and will have 200 people or less in attendance. Planning for a medium sized event can aided by using the Small/Medium Scale Event Planner & the Budget Builder Worksheet (on pages 78-81). Make sure that your treasurer is involved with planning your event. Planning for such an event may require the signing of legal contracts. Under no circumstances are students permitted to sign contracts on behalf of his/her organization or any part of Emory University. It’s important that you allow adequate time (at least 4 weeks prior to your event) to work with the Office of Student Leadership & Service, the Office of Multicultural Programs and Services, or the Department of Residence Life and Housing to get your contract signed. Only individuals in those offices may sign a contract for a student organization.

These events may also require special permitting. Please include Bridget Steele, Director of Fire Safety at Emory, in planning events that expect 250 or more persons in attendance, will use tents 201 square feet or more, or include a stage six inches or higher. A life safety evaluation from the Fire Safety Division must be conducted for these events and Bridget can help walk you though this process. Contact Bridget at 404-727-7378 or bridget.steele@emory.edu

**Large Scale Events** include events within the ordinary scope of the student organization (e.g. lectures, debates, or other programs) which require a significant amount of additional planning and coordination. Your Adviser should be involved in the planning of your large scale event as well as attend any large scale events that your organization plans. Make sure that your treasurer is involved with planning your event.

These events will likely require special permitting. Please include Bridget Steele, Director of Fire Safety at Emory, in planning events that expect 250 or more persons in attendance, will use tents 201 square feet or more, or include a stage six inches or higher. A life safety evaluation from the Fire Safety Division must be conducted for these events and Bridget can help walk you though this process. Contact Bridget at 404-727-7378 or bridget.steele@emory.edu

These events usually involved a well-known lecturer or performer (who we will call ‘an ARTIST’) and also have an expected attendance of more than 200 people. Planning for such an event may require the signing of legal contracts. Under no circumstances are students permitted to sign contracts on behalf of his/her organization or any part of Emory University. It’s important that you allow adequate time (at least 4 weeks prior to your event) to work with the Office of Student Leadership & Service, the Office of Multicultural Programs and Services, or the Department of Residence Life and Housing to get your contract signed.

Artists who are considered high profile or controversial will likely require additional security. The leaders within the hosting student organizations must speak with the Emory Police Department at least 4 weeks before the event. This will help you budget for your event and ensure that your event can take place safely.
Planning for an event of this size usually requires work to begin at least 10-12 weeks (possibly more) prior to the event. **Work with a staff member from the OSLS to help make your event a success.** Please see our Budget Builder Worksheet and Large Scale Event Planner to get started working on your event on pages 78 and 82.

**MOST COMMON MISTAKES: FUNDING & SECURITY**

Two of the most common mistakes student organizations make are related to funding and security, and they both occur at the very beginning of the planning process. We have a lot of checklists here to help you in the Eagle Source, but follow these basic four steps when you are starting the initial stages of any event:

- **STEP ONE**: Create Your Event Outline
  - Read the longer, more detailed suggested Check-Lists in the Eagle Source to help you think of all the aspects of the event
  - Do not make any firm agreements
  - This is the Information Gathering Stage – get prices, quotes, etc...
  - Don’t forget security
    - All events require some level of security. Some it may just require the Organization’s President to be on alert, some it may require your advisor to be present, some it may require hiring additional professional security, and some may require Emory Police presence.
    - Contact the Emory Police Department (404-727-8005) to get a security estimate that you can build into your budget. Security may be required for speakers and events with alcohol, so contact EPD or the OSLS for more information.

- **STEP TWO**: Complete a Budget
  - This step must include your President and Treasurer.
  - Follow the suggested budget worksheet in the Eagle Source
  - Ask vendors – will there be any other potential costs?
  - Don’t forget Campus Services costs (See “Working with Campus Services” section)
  - Don’t forget about Security costs (See the “Student-Invited Speakers” section).
  - Budget for unknowns

- **STEP THREE**: Secure Funding – your treasurer will know what all these terms mean.
  - Allocated - money you already have from your division
  - Self Generated – maybe from Ticket Sales, T-shirt Sales, etc...
  - Supplemental Funding – requires a bill to be submitted to your division. Your treasurer will know who to contact.
  - Co-sponsorships – approach other groups to get them to help. If you get an organization to help, be willing to amend your initial outline and budget to include their wishes too.
  - Fundraising (a form of Self-Generated funding) – there is more information in the “Fundraising and Donations” section
  - Request funding from other student organizations 6-8 weeks in advance. If you’ll need funding from College Council, submit your funding request bill. Funds requested from SGA must be request at least 35 days in advance.

- **STEP FOUR**: Make Revisions/Finalize your Outline
  - Now that you know how much money you have...
  - Cut (or Add if you’re lucky) things from your outline
  - Start the process of truly planning the event
    - Get Contracts at least 6 weeks in advance to the appropriate office
Have your treasurer start processing check requests, payment requests
Place any necessary orders
Consult the Checklists in the Eagle Source for more steps. These really are the major, umbrella, overarching four steps (granted, there are steps within these four themes, but these are the themes around which you need to think about planning).

The University now requires that student groups choose from an approved list of vendors for certain purchases. The university has contracts with vendors in the following areas:

- Audio-Visual
- Catering
- Cellular Service, Phones, and Pagers
- Computers, Printers, Software, and Peripherals
- Digital Copiers
- Education and Development
- Foral
- Lab Coat Laundering/ Linen Rental Services
- Lab/Research Goods and Services
- Maintenance and Repair Operations
- Office Supplies
- Printing Services, Brochures, Publications
- Promotional Items
- Records Storage of Emory Documents
- Relocation of Faculty and Staff
- Shipping and Mail Services
- Surplus Property, Recycling and Moves
- Travel
- Vehicle Rental, Ground Transportation

You can read more about how to make purchases in these particular areas and about the vendors in each category by visiting the finance division website at [https://www.finance.emory.edu/](https://www.finance.emory.edu/) and clicking the Procure and Pay tab. The areas of particular interest to student groups are Catering, Office Supplies, Printing, and Promotional Items. Many of the vendors that student groups have used in the past are not on the list of approved vendors. Club members cannot be reimbursed when using a vendor outside this list (see page 55 for a list of approved vendors).

In order to get payment processed you must use an approved vendor in these categories.

**BRINGING AN ARTIST TO EMORY & WORKING WITH AGENTS**

In this manual, we will refer to a lecturer, musician or performer as ‘an ARTIST.’ If you have an artist in mind to bring to Emory, you’ll need to do some investigating. Often, this will require that you make contact with an agent, who represents the artist you are considering.

Below, we have listed some agencies with which other student organizations have had good experiences. Neither SGA, nor OSLS endorse, or recommend any specific agency. The list below is by no means a complete list of agencies, just a few examples of the multitude of companies that exist:

- [Agency Group](http://www.theagencygroup.com/)
- [American Program Bureau](http://www.apbspeakers.com/)
- [CampusSpeak](http://www.campuspeak.com/)
- [Concert Ideas](http://www.concertideas.com/)
- [Global Talent Associates](http://www.globaltalentassoc.com/)
- [Greater Talent Network](http://www.greatertalent.com/)
Before you contact an agent:

- Know the Artist you are interested in
  - What is his/her background or expertise?
  - Conduct thorough research on the individuals’ background, including anything that may make the Artist controversial.
- Have specific dates in mind that you would like the Artist to come.
- Make sure that the venues that you’d hold your event in are available on the dates/times.
- Have some alternate Artists in mind, in the event that the Artist that you are interest in is beyond your budget. For instance, another speaker may have just as much, if not more, expertise and be within your price range.
- Know your budget! The total cost of an event is not just the fees of the Artist. Use the Budget Builder worksheet before you make contact with an agent.

Calling the agent

- Have paper and pencil ready to write down what you find out.
- You may even want to write out what you are going to say to the agent.
- Introduce yourself to the agent. Share your full name and tell them that you are a member of the [YOUR ORGANIZATION’S NAME] at Emory University. Be prepared to share a little bit about the purpose of your organization.
- Share with the agent that you are not allowed to ask for a contract or book a date; you are simply asking for information today for a possible booking in the future.
- You should be as honest as possible about the venue for the event, your timeline or any deadlines, the expected attendance, tickets, etc.
- It is acceptable to share the range of money that your organization can spend (i.e. $6,000-$10,000) or the range of your budget that you can afford to spend on the Artist.

Some questions to ask agents:

- Does your agency represent [Artist]?
- Is the artist on tour? If so, when will the artist be in the southeast/Georgia?
- What dates is the Artist available?
- What is the fee charged for this Artist? What does this fee include?
  - Is transportation and lodging included in the fee?
- What other colleges/universities has this Artist visited recently?
- Does the Artist have special dietary requirements? How many meals would we be expected to provide?
- Can you please fax/email me the Artist’s technical needs for an event?
- Do you have a contract that you’d prefer to be used or are you open to using the Emory University contract?
- What’s the best way to reach you if I have additional questions?

When you have found an Artist that you’d like to bring to campus and you have a clear idea of the costs associated with doing so, ask for commitments of support from departments and other student organizations. These commitments include but are not limited to financial support (approximate amounts), assistance with marketing, and providing volunteers.

All student organizations must have sufficient financing to cover all costs of an event prior to an offer being made.
Once you have completed your investigative & budgetary work, and you decide that you want to move forward with the event, bring your Adviser & Treasurer up to date with your progress and make contact with the OSLS to take the next steps!

DO NOT submit an offer for the Artist yourself. All offers must also come from the Office of Student Leadership & Service.

Ideally, when submitting the offer, the OSLS will negotiate that the Artist should make his/her own travel arrangements. However, if that is not the case, you must work with your treasurer and use the Emory travel website to assist you!

https://www.finance.emory.edu/travel/index.cfm

**THE NEXT STEPS**

When you meet with a staff member within OSLS, they will ask you to provide a few pieces of information:

- Your event’s Budget Worksheet (page 78)
- A Contract Coversheet, signed by the President, Treasurer, and Event Organizer (see page 75)
- Contact information for the artist in question
- Research on the Artist
- A complete schedule of events for the Artist
- The answers to the questions you asked the agent

It is likely that the staff member will also ask you questions about your event to help prepare you for anything that may arise. **Once a formal offer is made, it is considered THE POINT OF NO RETURN.** If you are unsure about the ability of your organization to carry out the event, or the finances, work through those difficulties before you make an offer.

The OSLS staff member will submit a formal offer to the Artist’s agent on your organization’s behalf. They will also negotiate any changes that may need to happen to make the event possible.

**Once you make an offer, it is the responsibility of your organization to fulfill the terms of the contract and all financial and logistical aspects of the event.**

If the offer is accepted, the agent will send a contract that binds your organization to the Artist. The contract will be signed and negotiated by a staff member in OSLS. If you prefer, the contract can also be given to a staff member within the Office of Sorority and Fraternity Life, the Department of Residence Life or the Office of Multicultural Programs & Services.

**ASP (ARTIST, SPEAKER, PERFORMER) ALERT FORMS**

All Student Organizations bringing any artist, speaker, or performer to campus must alert the Division of Campus Life. This can be accomplished in one of two ways:

- If the artist, speaker, or performer is being paid, a contract must be drafted and a Contract Cover Sheet from the Office of Student Leadership & Service must be filled out and on file by the Student Organization (see the section “Contracts”). The contract must be processed at least 4 weeks prior to the event, and can be processed by:
  - The Office of Multicultural Services & Programs for groups advised through their office
• The Office of Sorority and Fraternity Life for Greek Organizations
• The Office of Residence Life for all Residence Life Groups
• The Office of Student Leadership & Service for ALL other student groups.

• If the artist, speaker, or performer is coming **free and no contract is required**, an “ASP Alert Form” (Artist, Speaker, or Performer) must be filed with the Director of the Office of Student Leadership & Service at least 4 weeks prior to the event. The form can be found in the Eagle Source on page XX, and on the Office of Student Leadership & Service website.

  o All artists, speakers, or performers should have a security estimate provided by the Emory Police Department by contact Lt. Cheryl Elliot (celliot@emory.edu). Their recommendation may be one of the following, or any other at their discretion as they are the experts on assessing security needs:
    • No extra security necessary
    • Organization Advisor must be present
    • Outside, third-party security must be hired for basic crowd control
    • Emory University Police must be hired for crowd control and safety

**CONTRACTIONS**

All events at Emory University that require contracts must have fully executed contracts BEFORE the event. ‘Fully executed’ is defined as all documents bearing the signatures of both the artist's and the appropriate University designees (an Emory contract is available at [www.osls.emory.edu](http://www.osls.emory.edu)).

**What is a contract?**
A contract is a legally binding agreement between 2 or more parties in which a service is exchanged for compensation of some kind.

**Why are contracts important?**
Contracts enable responsibilities and entitlements to be very clear. Everyone knows their responsibilities, the venue info, time, place, fees, etc. Contracts also protect both parties and they provide remedies when problems arise.

**What is the difference between an Invoice and a Contract?**
An invoice is simply a business document detailing goods or services provided and requesting payment. It is a bill, essentially. Treasurers should bring them to the SGA Office to find out if they should be processed by the OSLS or if they can just be submitted for payment. **Students should not sign invoices either.**

**How do I get my contract signed?**
Fraternities and Sororities should work with the Office of Sorority & Fraternity Life; Residence Hall organizations should work with Andy Wilson in the Department of Residence Life & Housing. All other organizations may work with either the OMPS or OSLS. For SGA Chartered Groups spending Student Activity Fee or Self Generated money, **only** these people can sign the contract.

**Contracts must be dropped off at least 4-6 weeks prior to your event, and must be accompanied by a Contract Coversheet (regardless of what office is working through your contract).**

**What do I bring with me?**
When you have a contract that is ready to be signed, you need to bring:
The Eagle Source: A Guide for Student Organizations

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- **Cover Sheet** (see page 75 of the Eagle Source): It requires President, Treasurer, and Event Organizer Signatures, along with other information so give yourself a day or so to get all the appropriate information filled out.

- **Printed & Clean Copy of the Contract** with NO student organization markings – do not fill out anything, or write anything on it.

- **W9** – the vendor/artist/or speaker can usually provide you with a W9, however if they do not have one they you can print one from the Eagle Source website at [www.osls.emory.edu/eaglesource](http://www.osls.emory.edu/eaglesource) and you can find one at the back of the Eagle Source. W9 is required to be able to make a payment.

- **Any other materials** you have that may help us see how good the event planning is going (a budget, for example).

**What is the process?**

Bring your contracts in at least 6 weeks prior to your event. Expect a 3-4 week turnaround time on contracts, and then another 2-3 week turn around for checks and payments. Be ready to answer questions that we may have when you turn in a contract. We are the liaison for you between Risk Management and General Counsel. We usually consult with the University’s General Counsel for legal support and guidance pertaining to these documents. You should not contact General Counsel or the Office of Risk Management for events – work with the OSLS to do that.

During this time, you or your treasurer should also get a signed W-9 (page 91) if you will be paying an individual or company that the university has not paid within the previous year. Don’t worry; we have included more information about paying the artist in the treasurers’ handbook section of this manual.

When the contract is finished, we will notify you to come pick it up. There will usually be a coversheet attached to tell you of all the things to be careful of when you are planning the event. Additionally, your treasurer will then need to take the contract, and process it per his/her guidelines for payment. Checks and payment can take an additional two weeks, which is why a total of 6 weeks is suggested.

**SOUND ORDINANCE GUIDELINES**

Emory University is a collegiate environment, and as such we understand that events will occur in the late evening; however, we also want to be good neighbors. Therefore, it is important for all Student Organizations whose events utilize amplified sound (microphone, speakers, bands, DJs, etc…) to follow the guidelines that are in accordance with the DeKalb County Noise Ordinance.

1) Sunday Night – Thursday Night: No amplified sound outdoors after 10pm
2) Friday – Saturday Night: No amplified sound outdoors after 11pm.

**STUDENT-INVITED SPEAKERS & THE SPEAKERS POLICY**

Principles and Guidelines Governing Student-Invited Speakers

**Statement of Principles**

Emory University is an inquiry-driven, ethically engaged, and diverse community, dedicated to the ideals of free academic discourse and open exchange of ideas. Emory University is committed to the values of academic freedom and abides by the assumption that contention among different views is positive and necessary for the expansion of knowledge, both for the University itself and as a training ground for society at large. Emory seeks to foster the widest possible scope for the free circulation of ideas.

Such freedom is limited only by applicable laws and by the University’s commitment to maintaining an environment free of unlawful harassment and discrimination.
Emory also affirms that such freedom places a burden of responsibility on all members of the Emory community. Additionally, persons who are guests of the Emory community—and thereby benefit from the freedoms of the Emory community—assume these same responsibilities and obligations and must abide by the policies and rules of the University.

**Rights**
Student organizations have the right to invite speakers whose opinions may be deemed by some or most members of the community to be offensive, controversial, outrageous, biased, or unwarranted.

Anyone in the Emory community may distribute information about invited speakers and related events by means of electronic or other media, so long as this communication complies with policies, guidelines, and procedures of the University.

In the rare occurrence where a speaker or individual may be so controversial as to create a public safety concern, the University reserves the right to reschedule, relocate, or cancel the event.

**Responsibilities**
The rights outlined above impose certain responsibilities on organizations that extend invitations to prospective speakers. The responsibilities include the following:

- The inviting organization(s) must work in conjunction with staff members of the Office of Student Leadership & Service to plan the event. The steps outlined in the Large Scale Event Planner must be followed (page F5).
- The inviting organization(s) must assure security when requested by the speaker.
- The inviting organization(s) must alert the division of Campus Life, either through the contract process for speakers that are being paid, or the ASP Alert Form (See ASP Alert Section Above for more information).
- The organization must also contact the Emory Police Department to get a security estimate. EPD will determine if the speaker is so controversial as to be likely to create a security risk, not the Student Organization or event organizer. Except in unusual circumstances, the cost for security will be borne by the inviting organization(s).
- The sponsoring organization(s) must secure space adequate to the event.
- Communication about speakers and events must conform to Emory’s Policy on Equal Opportunity and Discriminatory Harassment (http://policies.emory.edu/1.3).
- Costs associated with speakers and events must be borne by the sponsoring organization(s).
- The behavior of persons attending events involving speakers (whether the speeches themselves or related receptions, dinners, book-signings, and so on) ultimately reflects on the sponsoring organizations; therefore, the sponsoring organization(s) must safeguard civility and plan for the possibility of uncivil behavior.
- When planning to bring a speaker to campus, student organizations should keep the following timeline in mind to ensure a successful, efficient, and productive planning and execution of the event.
- The Division of Campus Life will alert The President’s Office of all high profile guests (head of state, dignitary, government official) at least 8 weeks before the event so that they have the option to send a delegation to meet the guest if they deem it necessary. This may be done by contacting Marion Dearing (404.727.6013).

You must check with EPD to see if security will be required for your speaker.

Revised August 2008

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**FREEDOM OF EXPRESSION POLICY**

Emory University Freedom of Expression Policy
Freedom of expression, dissension and others forms of protest

As members of a community, it is imperative that we recognize the right of all individuals to share their opinions, even if we disagree with those opinions. As a community, we must strike a balance between the right to share one’s
opinion and the right to disagree with that opinion. We must also use our rights responsibly, for there are consequences for both the use of one’s words and one’s reaction to those words.

There is room for disagreement in any functional community. Forms of acceptable peaceful dissent or protest include: picketing, orderly demonstrations, distribution of leaflets, or peaceful assembly. Expressing one’s opinions or viewpoints must be viewed from the perspective of the Sponsor (the person, or group holding an event), as well as the perspective of the Dissenter or Protestor (the persons or group who hold an opposing viewpoint than might be expressed at an event organized by the Sponsor.)

The following will apply to all Emory University students, faculty and staff members. All forms of peaceful dissent will be subject to the approval of the appropriate University official. These forms of dissent will be permitted unless such an event interferes with the normal functioning or operation of the university, or significantly impede the rights of other individuals to participate in an event (such as a lecture, ceremony, interview or public event), or the acts of violence or harassment occur.

- **Encountering dissent in the process of program planning:**
  - Accept that individuals have a right to disagree with the position of your organization/department or sponsored guest. All forms of dissent must be nonviolent. Such events are not to be abhorred, but are to be viewed as opportunities for expression, discussion and understanding.
  - If you know, or are concerned, that your event may create controversy or a strong reaction on the part of other community members, please contact Lieutenant Finley of the Emory Police department (404-727-8005) to make sure that your security needs are met.
  - For student organizations, it is also important that the group work closely with a staff member from the Office of Student Leadership & Service and follow the appropriate event checklist.
  - If your event will involve a lecturer or guest, it is strongly advised that your organization/department reserve a large room and designate that room a “Free Speech Area.” With such an accommodation, individuals who oppose the viewpoints shared at your event will have a space, which is separate from your event, to express themselves and react to the event. Their expression will not interfere with any other individual’s ability to participate in your event.
  - Consider holding a moderated event with the individuals who oppose your position or viewpoint to further explore the issue. Such an event should not occur at the same time as the event in question. The goal of such an interaction would simply be to further understanding of multiple perspectives- not to convince another individual that your opinion is the only, or more, correct opinion.

- **Protesting or dissenting to a program, speakers, or event:**
  - From time to time, a member of the Emory community may have a position on a topic that creates a strong reaction. Such events are not to be abhorred, but are to be viewed as opportunities for expression, discussion and understanding. All forms of dissent must be nonviolent.
  - If your dissent is strong that you do not wish to attend the event, consider working with the Sponsor to reserve a large room and designate that room a “Free Speech Area.” With such an accommodation, individuals who oppose the viewpoints shared at the sponsored event will have a space, which is separate from the event, to express themselves and react. This expression will not interfere with any other individual’s ability to participate in the sponsored event.
  - Consider holding a moderated event with the individuals who oppose your position or viewpoint to further explore the issue. Such an event should not occur at the same time as the event in question. The goal of such an interaction would simply be to further understanding of multiple perspectives- not to convince another individual that your opinion is the only, or more, correct opinion.
  - All forms of peaceful dissent will be subject to the approval of the appropriate University official. Forms of dissent will be permitted unless such an event interferes with the normal functioning or operation of the university, or significantly impede the rights of other individuals to participate in an event or the acts of violence or harassment occur.
There are specific areas on the Atlanta campus of Emory University which can be used for peaceful freedom of expression. Such areas will be designated as “Free Speech Areas.”

Emory University reserves the right to refuse permission to use a particular area for dissention activities. When this does occur, all relevant reasons and rationale will be shared with the organizers.

Protest or demonstration activities must not:
- Prevent the orderly presentation of a University function, activity or program such as a lecture, ceremony, meeting, public event, or program.
- Interfere with the ability of a person to move about the campus for legitimate purposes. This includes inside and outside of any campus buildings. If any of the requirements are not complied with, students or attendees will be subject to arrest and or disciplinary action.

**Free Speech Areas**
- The terraces of the Dobbs University Center
- The Asbury Circle traffic circle
- The Quadrangle (in front of Candler Library)*
- Candler Library (the side facing Asbury Circle)*
- Patterson Green between the Schwartz Center and Goizueta School of Business*
- The lawn between Gambrell Hall and N. Decatur Rd*
- Rudolph Courtyard
- The lawn between Dowman Drive and Atwood Chemistry Center*
- The lawn between WHSCAB and the parking lot next to WHSCAB*
- Grace Crumb Rollins Garden (along Clifton Road)

Many of these spaces may be reserved through different administrative offices. The first point of recommended contact to reserve a space appropriate for your activity would be the Dobbs University Center, Meeting Services Office at 404-727-6157. Student organizations may refer to the *Eagle Source: A Guide for Student Organizations* for additional information on space reservations. The Eagle Source is produced by the Student Government Association (404-727-6179).

*Locations with an asterisk (*) denote the following: Demonstrations of a more quiet nature would be more suited for these locations since there are academic classrooms nearby. Amplified sound is not permitted before 5:00 pm.*

**MOVIES & COPYRIGHTED MATERIALS**

This policy is intended for individuals or organizations wishing to show a DVD or VHS publicly (outside the home to more than family and friends.) When you want to show a film on campus, you will be asked to provide proof that you have obtained permission (the “rights”) to show the material.

**Why does my organization need to get permission to show this film?**
Copyright infringement is a serious offense under the law, and is the equivalent of stealing from a film distributor. While it is important to abide by the law, it is also important that your organization represents itself well by doing the right thing—getting permission to show the film. The University counts on you and your organization to behave in a manner consistent with University policies, and state, local, and federal law. Should you or your organization be caught breaking copyright law, the University would not provide any kind of protection from your group’s liability under the law.

**When do you need permission, and when do you not need permission...**
PERMISSION NEEDED

• Any time you show a film in any public University space (this is any classroom, lounge, or common area at the University). These spaces are considered “public” spaces, and showing the movie in these areas is the equivalent to showing them in a theater.

• If you have used publicity to invite your audience to the showing (this includes but is not limited to mass e-mails, letters, flyers, and web postings). Because movie rentals are intended for private use, renting them does not provide you with the permission you need to have a public showing in which an audience is invited.

• If you are charging admission for the showing or an event in conjunction with the showing (charging for a lecture that will accompany the film, for example). This would be true even if you showed the film at your house, or at another venue off campus.

• You need permission even if the film showing is for educational purposes. If the distributor has special permission for films shown for educational purposes, they will still need to give you the written confirmation you need to protect your event under the law.

PERMISSION MAY NOT BE NEEDED

• You do not necessarily need permission if you are showing brief parts of a film. There are not set rules for what “brief” means in this context, but a general rule is that these snippets are OK when the event is free, when the snippet does not reveal key plot items to the film, when the length of the showing is not substantial, and when it doesn’t affect people’s likelihood of seeing the entire film.

• Your department may already have permission to show the film. If you are showing the film in conjunction with an academic department (especially the film department), that department may already have permission. Check with your department to be sure. If permission is already granted, they will be able to show you written proof of the fact.

• Viewing a movie in the privacy of your own home, or in the privacy of a residential room within a residence hall would not require a special license.

How do we get permission?

Getting permission for showing most films is fairly simple. For some rare or international films, it may prove to be a bit trickier. However, there are resources on campus to help you if you should have problems. Most “mainstream” films that are distributed for non-commercial use (which is what most campus showings would be) come from one of two main distributors, or you can search for the proper source:

• SWANK Motion Pictures, Incorporated – www.swank.com; phone number is 1-800-876-5577. The list of films they distribute is on their web page, but they add new films every day.

• Criterion – www.criterionpic.com; phone number is 1-800-890-9494.

• Conduct a web search – a good place to start is www.imdb.com, the Internet Movie Database. Simply go to the site, type your film in the search area on the left, and choose the correct film out of the results. Once you choose your film, go to the “Company Credits” and look up “distribution.”

• If you STILL can’t find out who distributes the film, you can call (310) 247-3020, to the Reference Library of the Motion Picture Academy.

What is a film distributor going to ask me?

• Your name, and the name of the organization with whom you are working.

• How you intend to show the film (advertise all over campus vs. to a small group, whether you are charging, what kind of venue you are showing the film in.)

• If there is a charge, how your organization will pay the rights to show the movie.

• Contact information for your organization.
Whether or not you need them to send you a copy of the film.

**Is this going to cost money?**

It might. The only way for you to determine this is to call the distributor, explain under what context the film will be shown, and see what they can do for you. If there is a fee, it will matter whether or not you are charging for the showing, how many people you expect, whether or not you need a copy of the film sent to you, and how often you show films. Have all the information handy about your event when you speak with the film’s distributor. Often (not always) the fee is less than $1,000 for older movies. Newer movies, or foreign films tend to cost more than an older, domestic films.

**After I have obtained permission, what “proof” does the University need to see?**

Once you have obtained the rights, you will receive a written record of your permission to show the film. This is commonly called a “confirmation.” If you are being charged, an invoice will follow this confirmation once you show the film. Confirmations can come via the mail, or via e-mail, and will have the film, the date(s) you have permission to show the film, the contact information of your representative from the distribution company, and the format you requested the film in (if the film is being sent to you), and other pertinent information. If a distribution company is unable to provide a confirmation, they should send you a letter or via e-mail that certifies that you have legally obtained the rights to show the film. This should be on letterhead with all contact information of the distributor available.

**This is so complicated! Why don’t I just “forget” to tell the University that I am showing a film?**

Even though it sounds complicated, it really is not difficult to obtain the proper permission to show films on campus. It will definitely take less time and money than defending yourself or your organization in court if you are caught! Intellectual copyright infringement is being prosecuted more and more on college campuses. It is just not worth the risk.

NOTE: Music copyright infringement falls under the jurisdiction of ASCAP or BMI. For helpful web sites, see [www.bmi.com](http://www.bmi.com) or [www.ascap.com](http://www.ascap.com). To contact ASCAP’s Atlanta office: Tel: (404) 351-1224 Fax: (404) 351-1252.

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**STUDENTS & GUESTS WITH DISABILITIES**

The Americans with Disabilities Act (ADA) requires that we provide reasonable accommodations and remove structural barriers to the provision of goods and services for persons with disabilities.

**Why is this important for student organizations?** Knowledge of the ADA is imperative for student organizations because it is very likely that individuals with disabilities will be in your audience! Accommodations for these individuals are expected and encouraged by the Student Government Association.

When choosing and assessing your event location keep the following in mind:

- If your program is outdoors, you must keep all curb cuts open – no tables or obstructions – to prevent blocking the accessible route for people with disabilities. This includes the traffic circle.
- If your event is indoors, be certain that there is an accessible route from parking, from bus stops and within the facility for people with disabilities. This includes facilities off campus.
- If your event is outdoors and includes the rental of portable toilets, you must include portables that are accessible to people with disabilities.

The Office of Disability Services can provide assistive listening devices available for any student with a hearing impairments, at no cost to him or her. The student must be registered with the Office of Disability Services in order for this service to be provided.

**ALL** publicity (including tickets) for your organization’s event must contain the name of the sponsoring organization, any cosponsors (if applicable) and an email address for any questions or requests for disability accommodations. So be sure to include the following statement on all your event materials: “If special accommodations are needed...”
owing to a disability or chronic medical condition, contact the Disability Services Office at 404/727-9877 voice or 404/712-2049 TDD.”

- If you are notified that attendees would like an American Sign Language interpreter at your event, please contact the Office of Disability Services at 404-727-6016.
- Only use the wheelchair logo on your advertising if the venue you are using has wheelchair accessibility.

The Office of Disability Services is always available to help. Contact then at 404-727-6016 or 404/727-9877 voice or 404/712-2049 TDD. When in doubt, always call the Office of Disability Services to get advice on the best way to be inclusive.

### WORKING WITH CAMPUS SERVICES

For many events, the location will not have all the necessary elements to help make the event successful. Events in the DUC will be supported by DUC staff. Student Organizations should request tables, trash cans, etc... through Meeting Services; however, for most other locations, a student organization will have to work with Campus Services for these requests and many more.

Tables, Chairs, Trash Cans, Recycle Bins and other basic event needs are handled by Campus Services. Additionally, they can do much more – carpentry, electrical, podiums, small stages, cleanup assistance, provide you access to a water hose to fill a barrel holding down your tent, or help you get tents permitted.

A complete directory of their services can be found at [http://www.fm.emory.edu/guidetoservices.pdf](http://www.fm.emory.edu/guidetoservices.pdf).

Requests should be submitted at least two weeks prior to an event. You can email them at cscsc@emory.edu or complete an online form at [http://www.fm.emory.edu/form/CSForm.cfm](http://www.fm.emory.edu/form/CSForm.cfm). You will need the following information ready: contact name, dates of event, set up/breakdown time, number of people expected, rain plan, type of food served, recycle/sustainable information, items needed to include, and exact amount of tables, chairs, trash cans, recycle bins.

**There may be charges associated with some of this.** The Customer Service Team is incredibly helpful, and do not hesitate to contact them, share your concerns, and let them help you! COMMUNICATE EARLY, PLAN YOUR EVENT, and HAVE A BACK UP PLAN, and you’re work with Campus Services Customer Service will be easy!

### WORKING WITH THE EXPERTS ON CAMPUS

Quite simply, if you are planning a program, especially one with an advocacy or health related tone, take advantage of the numerous experts we have on campus. An example would be if you are hosting a sexual assault awareness event or speaker, let the Student Health and Counseling office know that you are doing that, as they have sexual assault experts and consultants on their own staff. There have been examples in the past of student orgs forgetting to contact SHCS and then really messing up the information they conveyed to their members. So, if you are doing an event on cancer, acquaintance rape (or sexual assault), exercise, safer sex, you name it – just give them a call and chat with them and they can help support you.

This is just one example, and if you are unsure someone in the OSLS will be happy to brainstorm potential “experts” on campus! Some things to keep in mind...

- Experts are available for consultation if you want to fact-check information from the internet or a guest speaker before sharing it with your members.
They may be available to come to student org meetings to lead study breaks or to discuss nutrition, stress management, sleep, low risk alcohol and other drug choices, etc.

They can provide accurate statistics on the issue.

They probably won’t step on your toes or take over your event, but they may want to partner with you to be sure that students get accurate information and to be sure they get connected with on-campus resources.

They can provide brochures and other information for events.

It can be a nice change to hold an event off campus, especially if you find a space that can accommodate your needs for a particular event. The venues that you choose ought to have general liability insurance.

It is recommended as a part of planning your event, you request a current Certificate of Liability Insurance from the venue that you are using. Pay close attention to this certificate and the limits listed. If you have any questions, share the form with a staff member within OSLS.

Please consider transportation and parking when planning to go off campus. Also, investigate the handicapped accessibility of the venue you are choosing and advertise accordingly.

Pay attention to taxes and gratuities in contracts and agreements for off-campus locations, especially hotels and banquet halls.

Special Event Shuttles

When not serving the established routes, Emory campus shuttles are available to rent by Emory faculty, staff, students and Emory affiliates. Type your event information onto a Special Event Request Form (http://transportation.emory.edu/transportation/cliff/special_events.html - this form should be used by Emory faculty, staff, and students). E-mail the completed form (as an attachment-Excel spreadsheet). All requests should be submitted to the office of Transportation Services Monday-Friday between 8 a.m. and 3 p.m. Special event shuttle service is booked on a first-come first-served basis and a Smartkey # must be provided for billing purposes. The cost for this service is $75/hour per shuttle with a three-hour minimum reservation per shuttle.

Cancellation of or changes to an event must be made both in writing (on the Change Form) and verbally at least 24-hours prior to the event or by 4:00pm on Fridays for weekend events. To change the service needed for an event, click on the Change Form tab at the bottom of the original request form, note the changes on this form and submit the changes to wanda.teichert@emory.edu.

For more information on reserving a shuttle, view the Transportation Services website: http://transportation.emory.edu/transportation/cliff/special_events.html

Vans for up to fifteen-passengers are available for rent through Enterprise Rent-A-Car, located at the Emory Conference Center Hotel (404/727-8267; 1615 Clifton Road, Atlanta, GA 30329). See page 71 for more information of renting vehicles.

Good Tips for Advertising Your Event

Many organizations concentrate so strongly on event planning that they forget that marketing the event is just as important as reserving the space and securing the artist. Marketing and advertising should not be an afterthought; it should be an integral part of planning the event from the very beginning. Remember to include advertising in your budget as well. Keep the following in mind when determining your publicity plan.
Good Tips

1. **Put yourself in the shoes of the audience you want to attend.** How do you think it will be best to reach them? Where do they typically get messages? Where do they see flyers? What is the best time of the week to send an electronic flyer? What unique methods can we use besides technology – banners, chalking, invitations, direct mail, etc…

2. **Be consistent in your messages.** Everything should say the same thing. In order to help this happen, make sure all proofs for flyers are made at the same time. Even if you plan on having several different flyers or banners over the course of the weeks leading up to the event, make them ALL at the same time to ensure the messages are the same.

3. **Brand your organization**
   a. Design and use a logo on everything – same logo for your organization for all your events. Be sure to follow Emory Logo and Branding guidelines at [www.identity.emory.edu](http://www.identity.emory.edu).
   b. Pick a themed look for the event (doesn’t have to be a literal theme, but could be just a simple color scheme and font) and make it the same on all publicity. Flyer layouts and designs can be different, but there needs to be a consistent theme.

4. Reserve Banner Space and reserve Chalking time – see below for more information.

5. Take advantage of the other ways to advertise listed here – don’t do everything technologically. We all get bored deleting emails!

**TRUMBA Guidelines for Online Calendar**

TRUMBA is a University Wide events calendar, and it has been the goal of President Wagner to have all events occurring on campus and open to the public listed through this calendar. TRUMBA for Student Organizations will go live this semester, and SGA will email you through the Presidents/Additional Officers/Treasurers Listserv to let you know when it is ready. Please submit events through SGA Website [www.students.emory.edu/SGA](http://www.students.emory.edu/SGA).

The events posted on the Trumba online calendar must meet the following requirements. Submissions that do not meet the requirements will not go live on the Emory website. If your submission does not meet requirements, you will not be notified. Instead, it will be your responsibility to check back within three business days to see if your announcement has gone live. If you are still having trouble, please contact Linda Marson at Lmarson@emory.edu.

- The event must be one that targets non-members of your organization. Meetings, recruitment functions, and internal membership-only functions are not appropriate submissions and will not be approved.
- All events posted to the website must comply with Emory policies and procedures. All events are subject to the Conduct Code
- Please respect the University by not posting anything that could be considered inappropriate material. Anything deemed as such will be excluded from the site. Remember that parents, prospective students, and the outside community is the audience for the Emory.edu website.
- The Office of Student Leadership and Service is NOT responsible for misspelling, incorrect dates and times. The office will not serve as an editor for your submission.

Finally, if your chartered organization is not listed in the Student Organizations section, please contact Laura Rogers Reece at Iroge01@learnlink.emory.edu.

**Flyers in the Residence Hall**

No group or student organization may post any flyers in any Residence Hall without having them first approved and stamped in the Office of Residence Life & Housing on the 1st floor of Alabama Hall. Additionally, groups may not enter residences halls to pass out or distribute flyers.

**Bulletin Boards**

As part of the University’s Master Plan, there are several outdoor kiosks located throughout the campus. You are welcome to post fliers on them. Posting on kiosks is for official University communications only. No commercial posting. Also, please note that the kiosks will be cleaned every Monday by 9pm so plan your postings accordingly.
Bulletin Boards at the DUC are available on a first come first serve basis and open to all university events. Please assist us by removing your fliers when your event is over. Also, most academic buildings have bulletin boards that allow individuals to post material. Any material that you would like to post in a residence hall on main campus must be approved by the Office of Residence Life & Housing in Alabama Hall. If you would like to post material on the Clairmont Campus, please visit the Clairmont Community office within the Clairmont Tower.

**Flyers, Chalking, and Balloons**

1. Flyers/posters are not permitted on any sidewalks, streets, building exteriors, windows, or door. Posting of fliers in the Post Office must be cleared by DUC Operations in room 222-DUC.

2. Chalk is allowed on sidewalks and streets, as long as it is open to the elements, (no covered walkways, etc.). No chalking is allowed on building exteriors, or other vertical surfaces. (Please refer to specific DUC policies [http://www.emory.edu/DUC/policies.php](http://www.emory.edu/DUC/policies.php) request forms regarding chalking). Spray Chalk is NOT allowed; Penalty fees may apply.

3. Balloons may be used for promotional means and may be reserved in the Meeting Services Office [http://www.emory.edu/DUC/meeting_services.php](http://www.emory.edu/DUC/meeting_services.php), room 222. Balloons are to be secured using ribbon or string only; no tape please. Each group is responsible for removal of balloons at the end of the day for which they are scheduled. Failure to do so may result in a custodial clean-up fee.

**Table Tents**

Cox Hall Food Court and the DUC now have napkin dispensers with side windows for campus announcements. Standard table tents are no longer allowed. When you contact Meeting Services to reserve table tents in either location, you will be sent the dimensions and guidelines for the new displays. Your finished announcements are to be given to the manager of the Food Court by 3 pm Friday prior to the week you wish your announcement to run. The announcements will be placed in the napkin holders for you and will run one week.

Plastic table tents holders (4” by 6”) are now used in the DUC Commons and reservations can be made for a 3-day period. If you have any questions, please contact Andrea Lentz, Meeting Services, at 7-5355.

Forms are online at: [http://www.emory.edu/DUC/printable_forms.php](http://www.emory.edu/DUC/printable_forms.php).

**Tabling**

Table space may be reserved in the DUC Commons. These spaces may be used for information distribution, fundraising activities in compliance with University guidelines, and membership recruitment. Tables must display a legible sign indicating the name of the organization and the tabling permit must be present at the table. If not, the DUC staff reserves the right to ask your organization to leave the premises. Organization members must be present at all times to take full responsibility for the activity. Forms can be accessed online at: [http://www.emory.edu/DUC/printable_forms.php](http://www.emory.edu/DUC/printable_forms.php).

Tables at Wonderful Wednesday can be arranged thru the WW Learnlink conference.

**Handing out materials advertising your event or organization:**

- There must be no interference with normal operations of the University, including no forcing of materials on anyone.
- Distribution of printed materials in classrooms is at the discretion of the instructor.
- No printed material may be posted or placed on trees, interior or exterior walls or doors, cars, poles, benches, tables or on any campus property other than permanent official bulletin boards of the University designated for that purpose.
- Brochures, flyers and leaflets must be handed out person to person and cannot be left in stacks unattended.
- All posted materials, banners, booths, and tables must clearly display the name of the sponsoring student organization(s).
- Use of materials which include defamation, obscenity, or pornography is prohibited.
• Please remember that an individual, group, or organization is subject to the Student Code of Conduct. ([www.conduct.emory.edu](http://www.conduct.emory.edu))

**Banners Outside the DUC**

Banners advertising university-wide programming may be placed in the approved space between the two pillars at the bridge outside the DUC. Please schedule use of that space through Meeting Services at least 7 days in advance of the date needed. To have the banner hung and removed, call Customer Service at Facilities Management at 7-7463. Be sure that you provide them with a hang date and a take down date. The banner may remain for a maximum of seven days. Provide them with your Smartkey number as there is a charge for this service. More information and specifications on the banner size and design can be found on the reservation form ([http://www.emory.edu/DUC/printable_forms.php](http://www.emory.edu/DUC/printable_forms.php))

**BANNERS INSIDE THE DUC**

**Banners**

Stairway banners and dining railing reservations for the Dobbs University Center can be made in the Office of Student Leadership & Service (OSLS). The reservation form can be found online at [www.osls.emory.edu](http://www.osls.emory.edu). Banner reservations the exterior of the DUC are to be made through the Dobbs University Center (404-727-5355).

Banners may be used as promotional means by Emory University recognized organizations, departments and offices. All banners are scheduled on a first come first serve basis. Below are additional elements of the Emory University Banner Policy.

1. A banner may hang for 3 days prior to the event and the day of the event. It is to be removed by the sponsoring organization the morning after the event.
2. Banners may be hung horizontally on the railing of the Dining Terraces and vertically on the spiral staircase of the DUC atrium. The length of these banners should not exceed 6 ft. The width should not exceed 3.5 ft.
3. Banners may be hung with string ONLY and may not be secured with tape or any kind of adhesive. Any banners using tape/adhesive will be immediately removed and recycled—no exceptions!
4. Banners for events at which alcoholic beverages will be served shall not use the availability of alcohol as an incentive for attendance. Direct reference to alcoholic beverages may not be included. Emory University's name shall not be used in conjunction with any commercial co-sponsorship relating to alcohol. If you have questions, please contact the OSLS Director, in room 340E-DUC. OSLS reserves the right to remove any banner in conflict with this policy.
5. In order to conserve both paper and space, organizations that are sponsoring two or more activities within a time span of a week should use one piece of banner paper to publicize these events.
6. Banner materials are available in the OSLS, room 340E-DUC, only with an Emory ID. The Office closes promptly at 5 pm and if the materials are not returned then we reserve the right to hold the ID until they are returned.
7. Any recognized organization, department, or office wanting to hang a banner for an entire semester must come to the OSLS for permission. OSLS will review each individual request and inform the group within one week. In the event other groups are not able to hang their banner due to limited space, we reserve the right to take down the banner.
8. All banners must be stamped with the OSLS stamp or it may be taken down.
9. Any banner not complying with the above regulations will be removed and the sponsoring organization penalized by a suspension of privileges.

(August 2008)
Selling/Distributing Tickets at the DUC

In order to charge admission or sell tickets to an event, permission must be obtained from the SGA Finance committee during the budgeting process or well in advance of the event. The penalty for failing to gain approval is the same as the penalty for holding an outside account: your club could lose its charter.

Student organizations cannot make money off the Student Activity Fee. This means that groups receiving funding from their division, a different division, and/or SGA (SAF funds) for the event must deposit all ticket sale money into their allocated fund. Once the amount given (in SAF funds) from these sources had been deposited into your allocated Smartkey, then **and only then** can you begin to deposit the additional funds into your self-generated Smartkey. For example, if your club is granted $500 from your division and then sell $2000 with ticket sales, then you would deposit $500 into your allocated Smartkey and $1500 into your self-generated Smartkey.

If approval to sell tickets is granted, tickets can be sold at the DUC ticket desk. Dobbs University Center Ticket Distribution guidelines are as follows:

**Ticket Desk Policies & Procedures**

1. Distribution/sales of tickets to Emory-sponsored events will be done free of charge.
2. There will be a service charge added to non-Emory sponsored events.
3. Proceeds from sales for Emory sponsored events will be transferred to the sponsor's Smartkey #. This number should be provided on the Ticket Acceptance form.
4. The DUC will safeguard tickets and make them available to the Ticket Desk in reasonable quantities.
5. Failure to comply with ticket policies may be cause for refusing ticket services to a group.

**Appearance of Tickets**

1. Tickets should be printed on card stock. Paper tickets will not be accepted.
2. Tickets should be numbered sequentially.
3. Tickets should be grouped in bundles of no more than 50.
4. The following information should be printed on the face of the ticket:
   - Event name, time, location, price, ticket type (if there are categories, i.e., students, general public)
5. Tickets for multiple performances, categories, or prices should be printed on different color card stock.

**Putting Tickets on Sale**

1. A completed Ticket Acceptance Form should be submitted to the Operations Office at least one week in advance of the ticket sale date.
2. Tickets should be turned over to the Operations Office no less than 48 hours prior to the beginning of sales.
3. Tickets for events that are for profits will carry a $25 handling fee.

Note: Please make an appointment with the Operations Manager, DUC (7-1033) to review your Ticket Acceptance Form if this is your first time putting tickets on sale.

**Closing Out Ticket Sales**

1. Funds from the sale of tickets, less the $25 handling fee if applicable, will be transferred directly to the organization's Smartkey. Please be certain this Smartkey number is provided on the Ticket Acceptance Form.
2. The $25 handling fee will be transferred directly to the DUC Operations Smartkey.
3. Unsold tickets will be discarded. An appointment should be set up if the organization needs to collect leftover tickets.

**Take Note:** If tickets are being sold for an event that is paid for with Student Activity Fee Money, then deposits **MUST** go into the allocated fund.*

*The DUC Ticket Office strictly abides by a no refund policy.
Alcohol is strictly governed by Emory University Policy, and those policies must be strictly adhered to. In order to ensure complete safety, the following requirements are non-negotiable for events with alcohol at Emory University that are put on by Student Organizations. Events that are funded with Student Activity Fee money or events that are planned in any way by chartered student organizations must follow these guidelines. We realize that the requirements set forth can cause significant expense, but the liability associated with alcohol must be mitigated by safety controls.

1) **Student Organization Leadership** must be completely clear on the Alcohol Policy (found below).
2) **Registration**: The event must be registered per the guidelines below.
3) **Emory Card Reader**: All student organizations are required to use Emory Card Readers ($50.00 charge) to verify age. The person(s) operating the card reader must be a current Emory faculty or staff member who has been trained to use the machines. You must contact the Emory Card Office to reserve the equipment at least 2 weeks in advance (404-727-0224).
4) **Wristbands**: Must be used to indicate to the bartenders who is of-age
5) **Professional Servers**: licensed bartenders (non-students) must be hired, and have their credentials given to the advisor of the organization. For events in Cox Hall, Sodexo/Emory Catering must provide the servers.
6) **Advisor**: Your Advisor must be present. If s/he cannot be present, you must reschedule the event in order to accommodate your advisor, or you must hold the event without alcohol.
7) **Food**: Sufficient quantities of non-salty food should be provided.
8) **Non-Alcoholic Beverages**: In significantly greater quantities than the alcohol must be provided.
9) **Security**: professional security must be present to assist with crowd control, and to ensure people do not leave the event with alcohol.

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**THE ALCOHOL & DRUG ABUSE POLICY**

Emory University policies are subject to change at any time; visit [policies.emory.edu](http://policies.emory.edu) to ensure that you are relying on the current version. We have included the overview of the alcohol policy and for your convenience we have included the most pertinent parts of the alcohol policy (along with some another tips) in the sections entitled “Advertising Your Event- Alcohol and Advertising” and “Purchasing Alcohol”, but we do encourage you to read the entire alcohol policy at [http://www.policies.emory.edu/8.8](http://www.policies.emory.edu/8.8)

**Overview**

Emory University is committed to the health and well-being of its faculty, staff, and student body. Alcohol and drug misuse and abuse can be detrimental to one’s overall physical and emotional health, as well as academic and/or professional performance. As such, the University believes that it is the ethical responsibility of the University and its members to protect each other from high-risk and excessive use of alcohol and other drugs and to assist individuals who may have substance abuse problems in securing appropriate assistance.

As part of this commitment, Emory University complies with and upholds all federal, state, and local laws that regulate or prohibit the possession, use or distribution of alcoholic beverages or illicit drugs. Violations of such laws that come to the attention of University officials may be addressed within the University or through prosecution in the courts, or both.

As a recipient of federal grants and contracts, Emory University adheres to the provisions of the Drug-Free Workplace Act of 1988 and the Drug-Free Schools and Communities Act Amendments of 1989. As administrator of
certain state-funded financial aid programs for students, Emory University also adheres to Georgia’s Drug-Free Postsecondary Education Act of 1990.

This Policy is also designed to convey the University’s care and concern for its members and their well-being, given that alcohol and other drug use on college campuses is a major public health concern, and to foster faculty, staff, and students helping one another.

**Medical Amnesty Policy**

The Division of Campus Life recognizes that the potential for judicial action by the Office of Student Conduct may act as a barrier to students seeking medical assistance for themselves or other students in alcohol or other drug-related emergencies; therefore, the Division of Campus Life maintains a medical amnesty protocol. Read more about this policy at: [http://conduct.emory.edu/alcohol_and_drugs/medical_amnesty/index.html](http://conduct.emory.edu/alcohol_and_drugs/medical_amnesty/index.html)

**REGISTERING THE EVENT WITH ALCOHOL**

Events with alcohol that are funded with Student Activity Fee money or events that are planned in any way by chartered student organizations must be registered. The two page form is located on page 87. Detailed instructions are included on the form.

**ALCOHOL AND ADVERTISING**

- Publications of any type and in any media, including The Wheel and other newspapers, pamphlets, flyers, websites, etc., that receive some or all of their funding from University sources (including the Student Activity Fee) must not accept or contain commercial advertising or other materials that promotes, depicts or encourages excessive or underage consumption or use, or underage purchase, of alcoholic beverages or controlled substances.
- Depictions of the following may not be used in advertisements or in the promotion of events:
  - Excessive or underage consumption or use, or underage purchase, of alcoholic beverages or controlled substances
  - All-you-can-drink activities
  - Drinking games
  - Price specials on alcohol
  - Promotions or prizes featuring alcohol

This list is not exhaustive; it is meant to provide examples of the types of activities that are considered by the University as promoting excessive alcohol consumption. It is also not intended to cover alcohol consumption related to content of curriculum, research objectives, or alumni events.

**PURCHASING ALCOHOL**

Alcoholic beverages may not be purchased with any state or federal appropriated funds. For more information, contact the Office of Grants and Contracts Accounting. Clubs chartered by College Council may not have alcohol at their events.

Purchasing Cards (“P-cards”) are not to be used to purchase alcoholic beverages unless there is a special exception. For more information, contact the head of the specific unit or department.
The Student Programming Council, Student Government Association, and all other registered student organizations and student organizations that have been chartered through the Student Government Association must obtain approval from the Director of the Office of Student Leadership & Service for the purchase of any alcoholic beverage.

**Events with Alcohol (on campus)**

The following procedures apply to all University events where alcohol will be served, including, but not limited to, any internal or external sponsored events held on campus; fraternity and sorority events; campus organization events; divisional and departmental or unit events. The following procedures are provided to assist with the planning of events; however, the service of alcoholic beverages is permitted only in accordance with this Policy and state and local laws. Read the entire alcohol policy online at [http://www.policies.emory.edu/8.8](http://www.policies.emory.edu/8.8)

- A licensed caterer or trained non-student server may serve alcoholic beverages on an individual basis to those 21 years old and over. For students and others attending events that are supported by Student-Activity Fees, EmoryCard readers will be required to verify each individual’s age. **Kegs of beer are allowed at University events only if a licensed caterer or trained non-student server is hired to serve the beer.**

- All events where alcohol is served must have sufficient quantities of non-alcoholic beverages and substantial food offerings available at all times during the event.

- The following individuals or groups wishing to serve alcoholic beverages at any event that takes place on campus (excluding events at the Emory Conference Center, the Houston Mill House, the Miller Ward Alumni House or the Emory Inn) must complete an Emory University Event Registration Form.
  a) A campus organization;
  b) Any individual acting in a capacity other than on behalf of an academic or administrative department (this applies to both members and non-members of the University community);
  c) Anyone planning an open (public) event;
  d) Anyone planning an event at which a substantial number of expected attendees are under twenty-one years of age;

The Emory University Event Registration Form must be returned to the Office of Student Leadership and Service (OSLS). The form is available electronically at [www.osls.emory.edu/eaglesource](http://www.osls.emory.edu/eaglesource) as well as on page 87 in the Forms section.

**Off-Campus Events**

University-Sponsored Organizations are required to register their off-campus events with alcohol with OSLS by following the steps above.

### FOOD

Often, food can be used as a way to show appreciation to members of an organization or boost attendance at your event. If your event/meeting takes place in the Winship Ballroom or the Faculty Dining Room and you wish to use a caterer, you must arrange for that food through Emory Catering (Campus Dining). Emory Catering can charge your order directly to your club’s Smartkey number. Contact Catering at 404-712-8948. If you wish to provide food through another source, you must get permission from Meeting Services and the Foodservice Administration office at 404-727-5355.

Reserving rooms in Cox Hall requires that food be served. That food must also be ordered through Emory Catering (Campus Dining).

If you have a meeting/event that is in a reserved space or room, you can order food from a variety of places. Remember to save your receipts for reimbursement if you pay out of pocket. The standards for that food are stated below.

**GENERAL STANDARDS FOR GROUPS SERVING FOOD ON CAMPUS:**

You must use one of Emory’s preferred vendors for catered events that include 100 people or more. See the list on page 55.
1. Any food being served must be covered and/or protected from contamination. i.e. the use of sneeze guards or individually wrapped food items.
2. The serving area must be clean, free of clutter and trash, and wiped clean as spills occur.
3. Trash receptacles must be provided nearby.
4. Foods MUST be kept at the proper temperature. Cold below 40 degrees F; hot foods above 145 degrees F.
5. All servers much wash hands before working with food. Disposable gloves must be worn in serving/handling unwrapped food.
6. Must use tongs, forks or spoons to serve food. No hands!
7. Must have different people handling money than those handling the food, unless items are individually wrapped.
8. Food must be high quality and clean, and purchased from a licensed food distributor (i.e. Kroger, Publix, SAMS, etc.)
9. Student groups must meet with the Food Service Liaison to address specific requirements of serving eggs, fish, poultry, meat or other food combinations unless the following criteria are met:
   a. Food is prepared by Emory Merchant Vendors (vendors accepting the Emory Card)
      i. http://www.emory.edu/dining/Merchants.php
   b. Food is prepared by a contracted food provider:
      i. Sodexho
      ii. Old Fashioned Foods

   Food prepared by any other vendor must have a current health score of 95 or better, and have a current business license to serve food. (Documentation required.)

Note: You are advised to check the individual facility policy on serving food to be sure all stated guidelines for food use within that building or space are followed. These may be different from one location to the next.

Revised July 10, 2006

TAX EXEMPTIONS

Emory University is a nonprofit corporation. As such, Emory has a tax exempt status in many instances. Emory University is authorized to purchase tangible personal property and services to be used exclusively for educational purposes without payment of Georgia Sales and Use Tax.

This means that many common purchases, such as those listed below, are taxable:

- Purchase of food at local restaurants and grocery stores for meetings and business meals;
- Purchasing flowers;
- Purchasing gasoline.

Emory is also currently exempt from sales tax in 19 states: (CO, FL, GA, IL, KS, KY, MI, MS, MO, NJ, NY, NC, OH, PA, TN, TX, UT, VA, WY). To obtain a copy of those certificates see: https://www.finance.emory.edu/travel/taxexempt.cfm

Effective: 8/1/07

DEFENSIVE DRIVING FOR STUDENT ORGANIZATIONS

The Office of Student Leadership & Service (OSLS) administers a defensive driving program for current Emory University students who need to drive a rented vehicle on behalf of a student organization. This program is in place to reduce the likelihood of accidents, while increasing the safety of our roads. Only students who have received written permission from Emory University will be allowed to drive vehicles owned, rented or leased by the
University. Expenses related to renting University owned or leased vehicles will only be reimbursed for individuals who complete this process. Remember that for your convenience, there is an Enterprise Rental Center on campus at The Emory Conference Center.

The certification process is simple:

1. Give Emory consent to check your driving record by completing and submitting the Driving Record Consent form and the Safe Driver Enrollment Form (both found at www.osls.emory.edu). If your license was issued from the state of California, you will have to fill out an additional form (www.osls.emory.edu/eaglesource). Due to the sensitive information on the form(s), please drop the form(s) off in our office, Dobbs University Center, room 340E. It takes 2-4 business days to check a driving record.
   o Keep in mind that approval will be granted only to persons who are at least 18 years of age, have at least two years of driving experience and possess a valid driver's license for the class of vehicle to be driven. Rental company policies may vary, and if different from the requirements outlined in this policy, supersede these requirements.

2. When you submit the necessary forms, please also include a Smartkey number (using the self-gen Smartkey) or a check in the amount of $40 (made payable to Emory University).

3. If there is nothing objectionable found in your recent driving history, you will be contacted by our office with an access code to take an online defensive driving course. This course is sponsored by the National Safety Council. The National Safety Council will certify students who successfully complete the course. This course can be used to receive further discounts on your auto insurance.

The following resources can also be found on the OSLS website http://www.osls.emory.edu/defensive_driving.php:
- Safe Driving Tips
- A guide regarding what to do in case you get into an automobile accident.

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**PLANNING VOLUNTEER OPPORTUNITIES**

Group volunteering is a great way to build cohesion within your student organization while also meeting the needs of a local school, nonprofit, or community in need. Volunteering also provides opportunities for:
- leadership & professional skill development;
- recruitment of new group members;
- positive publicity for your group;
- genuine social interactions outside of the Emory community;
- exploration of a topic area or field of study (e.g. housing issues or environmental sustainability);
- collaboration with like-minded volunteers on & off campus;
- connections with on-going justice projects with deep, sustained community impact;

We have a great resource on campus through Volunteer Emory, located here in the Office of Student Leadership & Service. Volunteer Emory staff can help your organization connect with a meaningful service project. We have a number of service and justice programs that your group can simply plug into such as our weekly service trips to 15+ local organizations. We can also help you plan your own service effort.

For more information, visit the Volunteer Emory office in DUC 340E; reach us by phone at 404-727-6269 or check our website, www.volunteer.emory.edu.
Dear Treasurers,

Congratulations on being selected as the 2009-2010 treasurers for your organizations! Your role as treasurer is important to your club and imperative for the financial side of SGA to function properly. The position of treasurer is sometimes quite complex because it requires a substantial amount of time and effort, so let me be the first to thank you in advance for the work you will do over the course of this year. We in the SGA office are excited to work with you this year. It is our hope to strictly follow the guidelines set forth in this updated version of the Eagle Source. In doing so, we hope to eliminate inefficiency and ensure that everyone is able to make full use of their organization’s financial resources. In order to help you do this, this year’s Eagle Source guides you through all of the newly implemented processes for which you are responsible in the coming year. Additionally, there are many people to whom you may turn for guidance or practical assistance should you have questions which are not answered in the Eagle Source.

Each club falls under a specific school or division. Each school or division has a divisional treasurer who is responsible for the finances of the divisional council and also oversees the finances of each club chartered under his/her division. These divisional treasurers are here to help you should you have questions which directly concern your division or as a first contact if you have a more general question. Different divisions hold elections at different times throughout the year, but as it stands now the current divisional treasurers are:

<table>
<thead>
<tr>
<th>Division</th>
<th>Treasurer</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allied Health</td>
<td>Laila Sheikh</td>
<td><a href="mailto:lsheik@emory.edu">lsheik@emory.edu</a></td>
</tr>
<tr>
<td>BBA (Undergraduate Business)</td>
<td>Salima Hassan</td>
<td><a href="mailto:Salima.hassan@emory.edu">Salima.hassan@emory.edu</a></td>
</tr>
<tr>
<td>C3- Chandler Coordinating Council</td>
<td>Mark Batten</td>
<td><a href="mailto:Christopher.batten@emory.edu">Christopher.batten@emory.edu</a></td>
</tr>
<tr>
<td>Club Sports Council</td>
<td>Ilana Shushansky</td>
<td><a href="mailto:ishusha@emory.edu">ishusha@emory.edu</a></td>
</tr>
<tr>
<td>College Council</td>
<td>Brett Henson</td>
<td><a href="mailto:behenson@emory.edu">behenson@emory.edu</a></td>
</tr>
<tr>
<td>ESNA (Undergraduate Nursing)</td>
<td>Rebecca Ellenberger</td>
<td><a href="mailto:rellenb@emory.edu">rellenb@emory.edu</a></td>
</tr>
<tr>
<td>Graduate Business</td>
<td>Reed Moore</td>
<td><a href="mailto:rhmoor2@emory.edu">rhmoor2@emory.edu</a></td>
</tr>
<tr>
<td>Graduate Nursing Council</td>
<td>Aimee Hugener</td>
<td><a href="mailto:ahugene@emory.edu">ahugene@emory.edu</a></td>
</tr>
<tr>
<td>Graduate Senate</td>
<td>Monica Jefferson</td>
<td><a href="mailto:gradsenatetreasurer@hotmail.com">gradsenatetreasurer@hotmail.com</a></td>
</tr>
<tr>
<td>GSC- Graduate Student Council</td>
<td>Lisa Matragrano</td>
<td><a href="mailto:lmatrag@emory.edu">lmatrag@emory.edu</a></td>
</tr>
<tr>
<td>Media Council</td>
<td>Esther Yang</td>
<td><a href="mailto:esyang@emory.edu">esyang@emory.edu</a></td>
</tr>
<tr>
<td>MSS – Medical School Senate</td>
<td>Ira Leeds</td>
<td><a href="mailto:ileeds@emory.edu">ileeds@emory.edu</a></td>
</tr>
<tr>
<td>OEO- Outdoor Emory</td>
<td>Davis Burgess</td>
<td><a href="mailto:bdburge@emory.edu">bdburge@emory.edu</a></td>
</tr>
<tr>
<td>Oxford SGA</td>
<td>Farhan Kamili</td>
<td><a href="mailto:fkamil2@emory.edu">fkamil2@emory.edu</a></td>
</tr>
<tr>
<td>Rollins SGA (Public Health)</td>
<td>John Kiel</td>
<td><a href="mailto:jkiel@sph.emory.edu">jkiel@sph.emory.edu</a></td>
</tr>
</tbody>
</table>
All of the divisional treasures are ready and willing to help you should you have any questions, so please feel free to contact them. Please be aware that as the current system is so new, the divisional treasurers may not have the answers to questions that you may have. Therefore, it is our advice to try to find answers to your questions first with the divisional treasurer which directly heads your organization. If they are unable to answer your question, try either the SGA VP of Finance or someone in the SGA office on the 5th floor of the DUC. Our wonderful SGA staff is always available to answer questions when you need them. Our SGA Business Manager, Meredith Honeycutt, may be contacted at mhoney@emory.edu. Our SGA Administrative Assistant, Laura Rogers Reece, may be reached at lroge01@emory.edu. Finally, you may also contact me directly with any of your questions at enbrand@emory.edu. I will do my best to answer any questions you may have promptly and accurately. I hope that you find these resources helpful, and again, I am really looking forward to working with you all in what I and the rest of SGA hope is our successful year yet!

Elizabeth Brandt
SGA Vice President of Finance
enbrand@emory.edu
The Student Government Association is responsible for distributing the Student Activity Fee (SAF) among the various divisions. The fee, currently $86 per semester, is collected with tuition and divided between the divisions of the University based on the percentages in the Fee Split, a formula created and updated by the SGA. Each division then allocates SAF money among the organizations charter under that particular division. Budgeting occurs each spring; only groups that are perpetually chartered may apply for a budget. You can see a copy of the Fee Split at http://www.campuslife.emory.edu/central/blog/wordpress/sga/?page_id=52/

All SGA perpetually chartered organizations also have the privilege to request supplemental SAF funds, but the funds can not be exclusive to your organization. Supplemental funds are to be used for programming, whereas budgets should cover the club’s operational expenses. The division under which your club is chartered should be the first stop for requesting supplemental funds. Depending on the program and your target audience, supplemental funds can be requested from your divisional council, another division, and/or the SGA. Make sure to allow plenty of time when requesting supplemental funding; funds requested from SGA must be requested at least 35 days in advance. Submit your requests early and give as many detail as possible. For more information on requesting supplemental funds go to http://www.campuslife.emory.edu/central/blog/wordpress/sga/.

Any event held using SAF money must be open to the entire student body. The only exception is graduate school sponsored events with alcohol can not include undergraduates who are under 21.

All Student Activity Fee money must be kept in your allocated fund. If you choose to co-sponsor an event with an university department (or anyone other than another chartered student organization), you can not transfer SAF money into their Smartkey. All payments related to such an event should be paid for out of your funds and all paperwork should go through the SGA office. Do not have your school, advisor, or department process anything for you club.

Student organizations can not make money off the Student Activity Fee. This means that groups receiving funding from their division, a different division, and/or SGA (SAF funds) for the event must deposit all ticket sale (ticket sales require approval from the SGA treasurer) money into their allocated Smartkey. Once the amount given (in SAF funds) from these sources has been deposited into your allocated fund, then and only then can you begin to deposit the additional funds into your self-generated fund. For example, if your club is granted $500 from your division and collects $2000 in ticket sales, then you would deposit $500 into your allocated Smartkey and $1500 into your self-generated Smartkey. The same applies for T-shirt sales, CD sales, bake sales, etc.

Remember, clubs can not make money off the SAF.

Student organizations have a lot of autonomy when it comes to planning their events and spending their money. Treasurers are in charge for ensuring that funds are handled responsibly. We have high expectations of our student treasurers and hope that you will take the job seriously. The following list is to help you understand our expectations and your responsibilities. A treasurer is/should be:

1. The liaison for your organization to the Divisional treasurer
2. Responsible for submitting reimbursements and payments in a timely manner on behalf of the organization
3. Obtain or Submit all budget material (relines, supplemental funding forms, transfers) for your organization from/to the divisional treasurer

4. Keep funds positive and balanced with the SGA ledger kept by the SGA Business Manager

5. Obtain copies of your financial ledgers from the SGA VP for Finance or the SGA Administrative Assistant (email laura.reece@emory.edu)

6. Make sure all expenditures within your organization adhere to the SGA Monetary Code.

7. Make sure all deposits are brought to the SGA Administrative Assistant within 48 hours of the fundraiser.

**ALLOCATED & SELF-GENERATED SMARTKEYS**

Smartkeys are 10 digits long but almost always require a 5 digit account at the end making it a 15 digit number. Accounts tell the University what you are doing with the funds. For example 48010 indicates that you depositing money into your fund while 53200 indicates that you purchasing office supplies (more on accounts on page 53). You are responsible for your club’s money; do not share your Smartkey number(s) with anyone.

Your organization may have one or more Smartkey, based on your charter. Once you have been granted a temporary and/or enduring charter by your division and SGA, then you are eligible for a self-generated fund. At this point you can begin fundraising and should bring all deposits to the SGA Administrative Assistant (more information on deposits on page 51). At the time you bring funds to the SGA office, you will then be given a smartkey number. You are NOT eligible for a budget or supplemental funding with this type of charter. Once you have been granted a perpetual charter, you may also receive an allocated fund where all Student Activity Fee money you receive will be kept (this includes budgets and supplemental funding).

**Allocated Funds**

1. Allocated funds have a different Smartkey number than Self-generated fund
2. Only for perpetually chartered organizations.
3. This is Student Activity Fee Money. Funds are granted by the division (budgets or supplemental)
4. Budgeting takes place in the middle of the Spring semester
5. Funds can be used between September and May, and with special approval (usually graduate divisions) through July of the following year.

6. Funds **DO NOT** roll-over for use the following school year.

7. All purchases and outlays must adhere to monetary code

8. Supplemental funding must be placed in allocated Smartkeys (from any division or from SGA)

9. When making transfers to other student groups from your allocated funds, you must transfer the money into their allocated (not self-generated) Smartkey.

10. All SAF money must be kept in your allocated Smartkey. See details on co-sponsoring events under “The Student Activity Fee” on page 48.

11. You can not make money off the Student Activity Fee. See details on page 48

**Self-Generated Funds**

1. Self-generated funds have a different Smartkey number than Allocated funds

2. Given to temporary, enduring and perpetual organizations only when your organization has funds to be deposited. Self-Generated Smartkeys are not automatically issued.

3. Funds roll over every year

4. All funds collected by an organization (dues and self-generating events) are deposited here except when SAF money was used to put on an event that the club then makes money from (see next point).

5. You can not make money off the Student Activity Fee. See details on page 48.

6. Funds can be used freely by the organizations as long as spending complies with University and SGA policies and procedures

7. Self-generated Smartkeys that sit dormant (no transactions) for 2 years will be forfeited. SGA will transfer any funds left in the forfeited Smartkey of the club’s divisional council and reuse the Smartkey number for another group.

Remember to get a copy of your club’s spreadsheet(s) from Laura each month.

As treasurer, it is important to keep accurate ledgers of your Smartkeys and to make sure your ledgers balance with the ledgers in the SGA office which can be obtained from the SGA VP for Finance or Administrative Assistant, Laura Reece (laura.reece@emory.edu). Keep in mind that some direct charges made on campus, such as photocopies, phone, Sodexho, and bookstore purchases will be debited on the SGA ledger and you may not have record of these purchases. The University does **NOT** allow off campus accounts (this includes commercial bank accounts and Paypal accounts). If your group has one, close it immediately or you will lose your charter.

DEPOSITS

Now that you understand which money goes into which Smartkey, you are ready to make deposits for your organization. To deposit money into your Smartkey(s) bring the funds (cash and checks only) to the SGA office in DUC 515. Before you arrive, be sure to separate your cash from your checks and put all bills and checks of the same dollar value with the heads facing up and facing the same direction. You will also need to fill out a deposit form, available in the SGA Office in DUC 515 or on page 92. Remember, if you are charging students to attend an event and you have paid for the event with Student Activity Fee funds, deposits must first be made into your allocated Smartkey. Also, we can only accept cash and checks; we **cannot accept credit cards and PAYPAL is not an option.**

Filling out the form: Top to bottom

1. Fill in your Club Name

2. Your ten digit Smartkey number (usually self generated) with account 48010 added to the end goes in the first box where it says “Smartkey number”
3. There is no need to fill out a separate line in that box for each individual check. There is also no need to fill out a separate line for cash and checks. Simply total all the money (cash and checks) and fill in your total amount on the line beside the box where you entered your Smartkey number.

4. If you are making a deposit into your allocated and self generated Smartkeys, then you would use two lines in the box where you enter your Smartkey number(s).

5. In the next section (under the box we have been discussing), you will need to indicate how much money you have in checks and how much money you have in cash. Good thing you had already organized your deposit, separating cash from checks and putting all funds in ascending order facing the same direction. Messy money = miscounts

6. Make sure the amount you have recorded for cash and check add up to the total amount you have recorded.

7. Print your name, contact information, and the dates in the prepared by box at the bottom of the page

8. Hand the form and all funds to Laura Reece, the SGA Administrative Assistant in DUC 515.

Brinks Security Service picks deposits up from the SGA Administrative Assistant every Wednesday morning, so deposits must be in the office by Tuesday at noon (12:00 p.m.) in order to be recorded that week.

**EXAMPLE SGA DEPOSIT SLIP**

<table>
<thead>
<tr>
<th>Club Name</th>
<th>Emory XXXXXX Club</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Smartkey Number</th>
<th>0 0 0 0 0</th>
<th>( X X X X X ) 4 8 0 1 0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The first 5 numbers are zeros These 5 change for each different club This account code means deposit this money</td>
<td></td>
</tr>
<tr>
<td>Amount</td>
<td>$125.37</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Smartkey Number</th>
<th>____________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Here, you will usually put “dues” or sometimes you will describe your fundraiser (i.e. bake sale, car wash, T-shirt money)</td>
</tr>
<tr>
<td>Amount</td>
<td>$___________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Smartkey Number</th>
<th>____________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>________</td>
</tr>
<tr>
<td>Amount</td>
<td>$50.00</td>
</tr>
</tbody>
</table>

Total Deposit \$175.37

<table>
<thead>
<tr>
<th>Total Checks</th>
<th>150</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Cash</td>
<td>25.37</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prepared By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Date</td>
</tr>
<tr>
<td>E-mail</td>
</tr>
<tr>
<td>Phone</td>
</tr>
</tbody>
</table>
Accounts indicate what kinds of purchases you are making with your funds. These five digit codes are to be added to all paperwork following your Smartkey number. The account you choose should represent what you are buying (and not necessarily indicate how you are using it). For example, if you plan to advertise your event by chalking the walkway outside the DUC, you would still code the purchase of the chalk 53200 (chalk is an office supply) and not 62490 (even though you are using it to advertise). When filling out Expense Reports, be sure to add all the receipts that fall under the same account together and enter them on one line. For example, if you are reimbursing someone who bought food and drinks for a meeting add the pizza receipt from Domino’s and the soda receipt from Publix together and only enter one line for account 56515.

The following are the most frequently used accounts. If, for some reason, you are unable to find an account category that you need, call the SGA Business Manager at 727-3513.

<table>
<thead>
<tr>
<th>Account Description</th>
<th>Sub Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertising (Wheel ads &amp; t-shirts only)</td>
<td>62490</td>
</tr>
<tr>
<td>Alcohol (no college council clubs)</td>
<td>56510</td>
</tr>
<tr>
<td>Audio Visual Services</td>
<td>52620</td>
</tr>
<tr>
<td>Books &amp; Periodicals</td>
<td>57400</td>
</tr>
<tr>
<td>Camera/ Developing/Printing (not copies)</td>
<td>62470</td>
</tr>
<tr>
<td>Copies/ Duplicating (not printing)</td>
<td>62460</td>
</tr>
<tr>
<td>Deposits (fundraising credits to your Smartkey)</td>
<td>48010</td>
</tr>
<tr>
<td>Donations &amp; Contributions (from you)</td>
<td>55010</td>
</tr>
<tr>
<td>Entertainment</td>
<td>56500</td>
</tr>
<tr>
<td>Equipment Under $1400 (banners, costumes, calculators, staplers)</td>
<td>53800</td>
</tr>
<tr>
<td>Equipment $1400 and Above (computers)</td>
<td>75200</td>
</tr>
<tr>
<td>Food &amp; Catering (no tax exemptions)</td>
<td>56515</td>
</tr>
<tr>
<td>Honoraria &amp; Other Professional Fees</td>
<td>52190</td>
</tr>
<tr>
<td>Licensing Fees</td>
<td>58235</td>
</tr>
<tr>
<td>Maintenance and Repair</td>
<td>72510</td>
</tr>
<tr>
<td>Membership Dues</td>
<td>58210</td>
</tr>
<tr>
<td>Miscellaneous Supplies (And Flowers)</td>
<td>53600</td>
</tr>
<tr>
<td>Office Supplies (pens, paper, staples, ink cartridges)</td>
<td>53200</td>
</tr>
<tr>
<td>Phone Services</td>
<td>82411</td>
</tr>
<tr>
<td>Long Distance Phone Charges</td>
<td>82412</td>
</tr>
<tr>
<td>Parking</td>
<td>56190</td>
</tr>
<tr>
<td>Postage Stamps</td>
<td>62443</td>
</tr>
<tr>
<td>Metered Postage</td>
<td>62440</td>
</tr>
<tr>
<td>Shipping Costs</td>
<td>62430</td>
</tr>
<tr>
<td>Publication Costs and Printing (not copies)</td>
<td>62470</td>
</tr>
<tr>
<td>Registration Fees</td>
<td>56410</td>
</tr>
<tr>
<td>Rentals- Equipment</td>
<td>78120</td>
</tr>
<tr>
<td>Rentals- Space</td>
<td>78130</td>
</tr>
<tr>
<td>Travel</td>
<td>56100</td>
</tr>
<tr>
<td>Work Study Students</td>
<td>50240</td>
</tr>
</tbody>
</table>

*This is a partial list of club’s most common accounts. Call Meredith (404-727-3513) if your item does not fit any of these.
It is very important that you, as treasurer, work with the individuals in your group responsible for event planning. You are the organization’s expert on all things financial. You have been trained on the applicable policies and procedures, so make sure to share this information. Here is a list of suggested items to discuss with your club as it plans an event:

- **Monetary policy** for SGA and your division—your organization must follow monetary policy and ignorance on the subject is not a good defense.

- **Your budget**—Make sure your group knows that you have a limited amount of money that can be spent in each account and for the event as a whole.

- **Supplemental Funding**—Make sure your group understands where to go to request supplemental funding. Your own division should be the first stop and you should know their policy and procedures for requesting funds. In some cases other divisions and/or SGA may be an option. Make sure your programmers understand if any restrictions that were placed on your supplemental funding. Remember, this is SAF money and, therefore, it will always be in your allocated Smartkey.

- **Collaboration**—Encourage your group to seek co-sponsored events. Look to divisions and to University departments for possibilities of collaboration, although we have been warned that with the economic crunch, there may not be available funds for student organization programming this year. Your group does not have to shoulder the entire event on its own. See the section on Co-sponsored Events on page 21 for some ideas.

- **More on Co-sponsoring**—All Student Activity Fee money must be kept in your allocated fund. If you choose to co-sponsor an event with a University department (or anyone other than another chartered student organization), you cannot transfer SAF money into their Smartkey. All payments related to such an event should be paid for out of your Smartkey.

- **Contracts**—Make sure your event planners know when a contract will be necessary and that they understand the procedure for signing contracts (that students are **NOT** allowed to do so) and the timeframe for contracts. See section on Contracts on page 29 for more information.

- **Tax Exemptions**—Make sure anyone making purchases for your group understands what items are (and are **NOT**) tax exempt (and in which states). For more information read the section on “tax exemptions” on page 45.

- **Deadlines**—Make sure your group is on top of any deadlines for purchases and payment requests. Requests that involve a contract generally take about 6 weeks to get processed while general requests take about two weeks.

- **Fundraising**—Groups must obtain permission from their divisional treasurer. Raffles are **NOT** allowed. Off campus fundraisers and corporate sponsorship or in-kind donations from for-profit companies or businesses are allowed in limited situations. If your group is interested in this, please contact Rich Porter at (404) 712-4682.

- **Defensive Driving**—Expenses related to renting University-owned or leased vehicles will only be reimbursed for individuals who complete the defensive driving process. Go to page 45 for more information.

- **Making money off the SAF**—Student organizations can not make money off the Student Activity Fee. This means that groups receiving funding from their division, a different division, and/or SGA (SAF funds) for the event must deposit all ticket sale money (sale of tickets must be approved by SGA treasurer prior to sale) into their allocated fund. Once the amount given (in SAF funds) from these sources had been deposited into your allocated Smartkey, then **and only then** can you begin to deposit the additional money into your self-generated fund. For example, if your club is granted $500 from your
division and then sell $2000 with ticket sales, then you would deposit $500 into your allocated Smartkey and $1500 into your self-generated Smartkey.

- **FOOD**- For catered events, you must use a caterer from the preferred vendor list when planning a function for more than 100 people. Please check the Approved Caterers List for available caterers. Also remember you must include a list of attendees names if less than 10 people are at an event with food.

## PREFERRED VENDORS: HOW TO BUY

The University now requires that student groups choose from an approved list of vendors for certain purchases. You can read more about how to make these purchases and about the vendors in each category by visiting the procurement website at [https://www.finance.emory.edu/procurement/](https://www.finance.emory.edu/procurement/). The areas of particular interest to student groups are Catering, Office Supplies, Printing, and Promotional Items. Many of the vendors that student groups have used in the past are not on the list of approved vendors. Club members can not be reimbursed when using a vendor outside this list.

When making the decision to buy, always refer to the finance division website ([https://www.finance.emory.edu/](https://www.finance.emory.edu/)) first. Click on Procure & Pay and then click on Buying in the Marketplace. Select the category you are interested in for a list of approved suppliers and instructions on how to place your order. If you are unable to locate your supply need from our contract suppliers, you may then use the SGA Supplier Directory. If you are still unable to locate a supplier after using the Emory Marketplace and SGA Supplier Directory, please contact the Commodity Manager or Buyer responsible for that commodity (you can find the staff list through the Procure & Pay tab on the finance website.

These are Emory's preferred/contracted suppliers. Links to their websites should be accessed within Emory Express. These suppliers have University negotiated pricing contracts and they must be used for your club’s purchases:

<table>
<thead>
<tr>
<th>Commodity/Service</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio Visual</td>
<td></td>
</tr>
<tr>
<td>AVYVE; To obtain AVYVE quote, contact the Emory Procurement Buyer, Pamala Phelps.</td>
<td>404-727-1952</td>
</tr>
<tr>
<td>Glenn Memorial Sound, AV needs</td>
<td>404-727-9200</td>
</tr>
<tr>
<td><strong>Catering</strong> For events with catering charges of $1499 or less, a P-card is the preferred form of payment. For events over $1499, the invoice should be submitted through Emory Express by using the &quot;Invoice Attached&quot; form.</td>
<td>404-869-8858</td>
</tr>
<tr>
<td>*Event Catering is defined as a function totaling more than 100 people in which a licensed caterer provides all food, on site staffing, and necessary equipment for the event.</td>
<td>770-321-9592</td>
</tr>
<tr>
<td>A Legendary Event</td>
<td>404-872-7859</td>
</tr>
<tr>
<td>Added Touch Catering</td>
<td>404-728-0770</td>
</tr>
<tr>
<td>Affairs to Remember Catering</td>
<td>404-918-8386</td>
</tr>
<tr>
<td>Avalon Catering</td>
<td>404-633-9233</td>
</tr>
<tr>
<td>Badda Bing</td>
<td>404-815-1178</td>
</tr>
<tr>
<td>Bhojanic Restaurant</td>
<td>404-872-1999</td>
</tr>
<tr>
<td>Bold American Catering</td>
<td>404-872-1999</td>
</tr>
<tr>
<td><strong>Computers</strong></td>
<td></td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Contact Meredith Honeycutt (Business Manager SGA)</td>
<td>404-727-3513</td>
</tr>
<tr>
<td><strong>Emory Computing Resources</strong></td>
<td></td>
</tr>
<tr>
<td>Helpdesk</td>
<td>404-727-7777</td>
</tr>
<tr>
<td><strong>Software/Peripherals</strong></td>
<td></td>
</tr>
<tr>
<td>Software Distribution Microsoft (MAC &amp; PC)/OS Upgrades</td>
<td>404-727-4741</td>
</tr>
<tr>
<td>CDWG (Adobe software, computer peripherals)</td>
<td>800-696-1727 ext. 7275</td>
</tr>
<tr>
<td><strong>Digital Copiers</strong></td>
<td></td>
</tr>
<tr>
<td>Contact Meredith Honeycutt (Business Manager SGA)</td>
<td>404-727-3513</td>
</tr>
<tr>
<td><strong>Brochures &amp; Publications (Emory only)</strong></td>
<td></td>
</tr>
<tr>
<td>Emory Marketing</td>
<td>404-727-9998</td>
</tr>
<tr>
<td><strong>Floral</strong></td>
<td></td>
</tr>
<tr>
<td>Emory Village Flowers and Gifts</td>
<td>404-378-3900</td>
</tr>
<tr>
<td>Maud Baker Florist</td>
<td>404-614-0598</td>
</tr>
<tr>
<td><strong>Furniture</strong></td>
<td></td>
</tr>
<tr>
<td>Contact Meredith Honeycutt (Business Manager SGA)</td>
<td>404-727-3513</td>
</tr>
<tr>
<td><strong>Lab/Research Goods &amp; Services</strong></td>
<td></td>
</tr>
<tr>
<td>Applied Biosystems</td>
<td>800-831-6844</td>
</tr>
<tr>
<td>Agencourt Bioscience (Name will soon change to Beckman Coulter Genomic Services)</td>
<td>800-361-7780</td>
</tr>
<tr>
<td>Euronfins/MWG/Operon</td>
<td>256-704-8200</td>
</tr>
<tr>
<td>Fisher Scientific</td>
<td>770-871-4500</td>
</tr>
<tr>
<td><strong>Maintenance &amp; Repair Operations</strong></td>
<td></td>
</tr>
<tr>
<td>Associated Paper</td>
<td>770-929-1987</td>
</tr>
<tr>
<td>Grainger Industrial Supply</td>
<td>404-245-9018</td>
</tr>
<tr>
<td>Graybar Electric Co</td>
<td>678-291-5211</td>
</tr>
<tr>
<td>HD Supply</td>
<td>404-759-1303</td>
</tr>
<tr>
<td>MSC Industrial supply</td>
<td>678-357-6822</td>
</tr>
<tr>
<td>Southeast Link</td>
<td>678-618-1895</td>
</tr>
<tr>
<td><strong>Walter H Hopkins Co</strong></td>
<td>770-955-5025</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td><strong>Newspapers</strong></td>
<td></td>
</tr>
<tr>
<td>The Emory Report</td>
<td>404-727-5546</td>
</tr>
<tr>
<td>The Emory Wheel</td>
<td>404-727-6178</td>
</tr>
<tr>
<td>USA Today</td>
<td>800-872-0001</td>
</tr>
<tr>
<td><strong>Office Supplies</strong></td>
<td></td>
</tr>
<tr>
<td>Staples Business Advantage</td>
<td>404-727-1323</td>
</tr>
<tr>
<td><strong>Photo/Video Services</strong></td>
<td></td>
</tr>
<tr>
<td>Emory Photo/Video Services</td>
<td>404-727-6227</td>
</tr>
<tr>
<td><strong>Printing &amp; Document Services</strong></td>
<td></td>
</tr>
<tr>
<td>AlphaGraphics (Business card, letterhead, and all stationary needs)</td>
<td>770-279-8882</td>
</tr>
<tr>
<td>Emory Campus Printing</td>
<td>404-727-7147</td>
</tr>
<tr>
<td>Emory Graphic Design Services (Poster, Sign &amp; Banner Center)</td>
<td>404-727-5665</td>
</tr>
<tr>
<td>FedEx Kinkos (off campus and after-hours document services)</td>
<td>404-321-3990</td>
</tr>
<tr>
<td><strong>Print Supplier Program</strong></td>
<td></td>
</tr>
<tr>
<td>Associated Printing Company</td>
<td>770-784-9566</td>
</tr>
<tr>
<td>Bennett Graphics</td>
<td>770-696-2623</td>
</tr>
<tr>
<td>Canterbury Press</td>
<td>770-952-8309 ext. 27</td>
</tr>
<tr>
<td>Colour One O One</td>
<td>404-350-1700 ext. 31</td>
</tr>
<tr>
<td>Miracle Graphics</td>
<td>770-451-7778</td>
</tr>
<tr>
<td>Offset Atlanta</td>
<td>770-448-2765 ext. 257</td>
</tr>
<tr>
<td>ProGraphics</td>
<td>678-597-1059</td>
</tr>
<tr>
<td>Standard Press</td>
<td>404-351-6780</td>
</tr>
<tr>
<td>Wallace Graphics</td>
<td>770-723-0202</td>
</tr>
<tr>
<td>Walton Press</td>
<td>770-267-2596</td>
</tr>
<tr>
<td><strong>Promotional Items</strong></td>
<td></td>
</tr>
<tr>
<td>Madden</td>
<td>404-543-2223</td>
</tr>
<tr>
<td>Pinnacle Promotions</td>
<td>678-990-8158</td>
</tr>
<tr>
<td>Summit Marketing</td>
<td>770-303-0488</td>
</tr>
<tr>
<td><strong>Reserving Space at Emory Campus</strong></td>
<td></td>
</tr>
<tr>
<td>Academic Buildings (after 6 PM); Anthropology, Callaway, Candler Library, Glenn Church School Building, North Decatur Building, Rich Building, and White Hall</td>
<td>404-727-5354</td>
</tr>
<tr>
<td>DUC Meeting Rooms</td>
<td>404-727-1706</td>
</tr>
<tr>
<td>DUC/Cox Dining Rooms/Glenn Reservations <strong>Evening &amp; Weekend</strong></td>
<td>404-727-5355</td>
</tr>
<tr>
<td>DUC/Cox Dining Rooms/Glenn Reservations <strong>Week Days</strong></td>
<td>404-727-6042</td>
</tr>
<tr>
<td>Millard Award Alumni House Reservations</td>
<td>404-727-6400</td>
</tr>
<tr>
<td>Res Life Residence Hall Commons Areas</td>
<td>404-727-4144</td>
</tr>
<tr>
<td>SAAC Reservations, Pool, Tennis Courts</td>
<td>404-712-2430</td>
</tr>
<tr>
<td>Woodruff PE Center Reservations, McDonough Field</td>
<td>404-727-6733</td>
</tr>
<tr>
<td><strong>Emory Services</strong></td>
<td></td>
</tr>
<tr>
<td>Emory Moving Services</td>
<td>404-727-7465</td>
</tr>
<tr>
<td>Emory Recycles</td>
<td>404-727-2052</td>
</tr>
<tr>
<td>Emory Surplus Property</td>
<td>404-727-7463</td>
</tr>
</tbody>
</table>
The following non-contracted vendors have been approved for student clubs to use. All suppliers listed in this directory have previously conducted business with SGA and have been informed of Emory’s Procurement policies and procedures. You may contact these suppliers directly to obtain information, however you must place the order through Emory Express. These suppliers have been informed that they are only to accept orders accompanied with a formal Emory University purchase order number. Personal funds should not be used to buy these goods and services.

SGA Supplier Directory:

<table>
<thead>
<tr>
<th>Commodity</th>
<th>Supplier Product/Service</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio-Visual</td>
<td>Media Products</td>
<td>770-772-4252</td>
</tr>
<tr>
<td></td>
<td>Audio Visual Products &amp; Services</td>
<td></td>
</tr>
<tr>
<td>Awards/Trophies</td>
<td>See Preferred Promotional Vendors</td>
<td></td>
</tr>
<tr>
<td>Database/Software</td>
<td>EBSCO</td>
<td>800-758-5995</td>
</tr>
<tr>
<td></td>
<td>Epocrates Inc</td>
<td>650-227-1700</td>
</tr>
<tr>
<td></td>
<td>Interactive Collegiate Solutions</td>
<td>806-698-1408</td>
</tr>
<tr>
<td></td>
<td>Onyx Consulting Inc</td>
<td>404-924-8630</td>
</tr>
<tr>
<td></td>
<td>Open Text</td>
<td>800-825-3627</td>
</tr>
<tr>
<td>Entertainment Needs</td>
<td>A-1 Inflatables LLC</td>
<td>404-388-6446</td>
</tr>
<tr>
<td></td>
<td>A-1 Tent and Party Rentals</td>
<td>770-458-7740</td>
</tr>
<tr>
<td></td>
<td>Atlanta Botanical Garden</td>
<td>404-876-5859</td>
</tr>
<tr>
<td></td>
<td>Atlanta Challenge LLC</td>
<td>404-848-1001</td>
</tr>
<tr>
<td></td>
<td>Atlanta Ice Company</td>
<td>800-473-7585</td>
</tr>
<tr>
<td></td>
<td>Atlanta Music Machine</td>
<td>770-517-3150</td>
</tr>
<tr>
<td>Company</td>
<td>Service/Products</td>
<td>Phone Number</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------</td>
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</tr>
<tr>
<td>Atlanta Sound &amp; Lighting</td>
<td>Sound/Lighting for Events</td>
<td>770-455-7695</td>
</tr>
<tr>
<td>Atlanta Tent Rental</td>
<td>Tent Rentals</td>
<td>770-667-2555</td>
</tr>
<tr>
<td>Avalanche Entertainment Inc</td>
<td>DJ's/Live Bands/Entertainment</td>
<td>770-751-0000</td>
</tr>
<tr>
<td>Avatar Events Group</td>
<td>Studio Equipment Rental</td>
<td>404-589-9450</td>
</tr>
<tr>
<td>Balloons &amp; Events Over Atlanta</td>
<td>Balloons, Decorating Service</td>
<td>404-231-3090</td>
</tr>
<tr>
<td>Bartenders For All Occasions</td>
<td>Bartender Event Services</td>
<td>404-325-3080</td>
</tr>
<tr>
<td>Black Tie Events</td>
<td>DJ's/Live Bands/Entertainment</td>
<td>770-582-0525</td>
</tr>
<tr>
<td>Casarotto Ramsay &amp; Associates LTD</td>
<td>Represents Writers, Director, Producers</td>
<td>44 (0) 22 7287 4450</td>
</tr>
<tr>
<td>Comfort Zone Portables</td>
<td>Portable Toilets</td>
<td>770-772-8066</td>
</tr>
<tr>
<td>Complete Music</td>
<td>Disc Jockey/Video Services</td>
<td>770-425-3535</td>
</tr>
<tr>
<td>Criterion Pictures</td>
<td>Distribution/Licensing of Movies</td>
<td>800-890-9494</td>
</tr>
<tr>
<td>Daniel's Charters and Tours</td>
<td>Atlanta Bus Tours</td>
<td>866-532-6878</td>
</tr>
<tr>
<td>Discraft Inc</td>
<td>Mfger of Disk Sports/Frisbees, etc.</td>
<td>248-624-2250</td>
</tr>
<tr>
<td>Entertainment Design Group</td>
<td>Live Show Production/Management</td>
<td>678-945-2400</td>
</tr>
<tr>
<td>Event Xtras</td>
<td>Game Rentals (Trampoline, Laser Zone, etc.)</td>
<td>800-239-4677</td>
</tr>
<tr>
<td>Folade Na Weusi (Drum &amp; Dance)</td>
<td>Drum &amp; Dance Ensemble</td>
<td>678-458-5397</td>
</tr>
<tr>
<td>Georgia Tent &amp; Awning Company</td>
<td>Tent/Awning Rentals</td>
<td>404-523-7551</td>
</tr>
<tr>
<td>Georgia World Congress Center</td>
<td>Sport/Entertainment Complex</td>
<td>404-223-4000</td>
</tr>
<tr>
<td>Greater Talent Network</td>
<td>Speaker/Lecture Agency</td>
<td>800-326-4211</td>
</tr>
<tr>
<td>Interactive Attractions</td>
<td>Game Rentals (Trampoline, Laser Zone, etc.)</td>
<td>770-458-1094</td>
</tr>
<tr>
<td>J &amp; S Funtastic</td>
<td>Game Rentals (Rock Wall, Slides, etc.)</td>
<td>770-973-2633</td>
</tr>
<tr>
<td>Manga African Dance</td>
<td>Non-profit Dance Repertoire Company</td>
<td>404-725-4260</td>
</tr>
<tr>
<td>Montara Farm (Horseback Riding)</td>
<td>Team Building/Horseback Riding</td>
<td>770-983-0503</td>
</tr>
<tr>
<td>Musimatic Inc</td>
<td></td>
<td>770-484-8434</td>
</tr>
<tr>
<td>Nantahala Outdoor Center</td>
<td>Whitewater Rafting</td>
<td>888-905-7238</td>
</tr>
<tr>
<td>Norred &amp; Associates</td>
<td>Security/Investigative Firm</td>
<td>404-761-5058</td>
</tr>
<tr>
<td>O'Brien Productions</td>
<td>Event Planners</td>
<td>440-422-7200</td>
</tr>
<tr>
<td>Orleagian Snowballs LLC</td>
<td>Frozen Treat</td>
<td>404-897-4646</td>
</tr>
<tr>
<td>Outdoor Adventure Rafting</td>
<td>River Rafting</td>
<td>800-627-7636</td>
</tr>
<tr>
<td>Pit Stop</td>
<td>Portable Toilets</td>
<td>770-439-2888</td>
</tr>
<tr>
<td>Reese Tent Rental Inc</td>
<td>Tent Rentals</td>
<td>404-355-1392</td>
</tr>
<tr>
<td>Rolling Thunder River Company</td>
<td>River Rafting</td>
<td>800-408-7238</td>
</tr>
<tr>
<td>SkyDive Atlanta</td>
<td>Sky Diving</td>
<td>800-276-3483</td>
</tr>
<tr>
<td>Southeastern Expeditions</td>
<td>River Rafting</td>
<td>800-868-7238</td>
</tr>
<tr>
<td>Spectrum Entertainment</td>
<td>Audio/Visual Production Services</td>
<td>770-492-1266</td>
</tr>
<tr>
<td>Swank Motion Pictures</td>
<td>License to show Copyrighted Movies Legally</td>
<td>800-876-5577</td>
</tr>
<tr>
<td>Tams Witmark Music Library Inc</td>
<td>Musical Theater Licensing Company</td>
<td>212-688-9191</td>
</tr>
<tr>
<td>The Fox Theatre</td>
<td>Show &amp; Event Venue</td>
<td>404-881-2100</td>
</tr>
<tr>
<td>Wildwater LTD</td>
<td>Whitewater Rafting</td>
<td>866-319-8870</td>
</tr>
<tr>
<td>William Morris Agency Inc</td>
<td>Entertainment Representatives</td>
<td>212-903-1100</td>
</tr>
<tr>
<td>Ideas United LLC</td>
<td>Student Event Planning</td>
<td>404-748-0012</td>
</tr>
<tr>
<td>Giwayien Mata Inc</td>
<td>Female Drum &amp; Dance Troop</td>
<td>404-766-4001</td>
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</table>
The Eagle Source: A Guide for Student Organizations

<table>
<thead>
<tr>
<th>Music</th>
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<tr>
<td>The Guitar Store</td>
<td>Musical Instrument Store</td>
<td>404-320-7253</td>
</tr>
<tr>
<td>Photo Equipment/Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B &amp; H Photo</td>
<td>Photography Equipment/Supplies</td>
<td>800-606-6969</td>
</tr>
<tr>
<td>Printing</td>
<td></td>
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<tr>
<td>Walton Press</td>
<td>Web Printer</td>
<td>770-267-2596</td>
</tr>
<tr>
<td>Production Services</td>
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<tr>
<td>Day-1 Production Services LLC</td>
<td>Grip &amp; Lighting Equipment Rentals</td>
<td>404-687-9511</td>
</tr>
<tr>
<td>Exocet Studios &amp; Productions</td>
<td>Recording Studio</td>
<td>770-455-7256</td>
</tr>
<tr>
<td>Greatape/MediaXpress Corp</td>
<td>Recording Studio</td>
<td>612-872-8284</td>
</tr>
<tr>
<td>Kudzu Productions</td>
<td>Video, Film, Multimedia Production</td>
<td>256-820-4332</td>
</tr>
<tr>
<td>Lighting &amp; Production Equipment</td>
<td>Lighting &amp; Production Rental</td>
<td>404-352-0464</td>
</tr>
<tr>
<td>Magnum Companies</td>
<td>Lighting, Design Event Production</td>
<td>404-872-0553</td>
</tr>
<tr>
<td>Production Consultants &amp; Equipment</td>
<td>Production Equipment Rental</td>
<td>404-609-9001</td>
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<tr>
<td>Wildphyre Productions</td>
<td>Party Productions</td>
<td>770-933-9060</td>
</tr>
<tr>
<td>Sports Equipment/Supplies/Clothing</td>
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<tr>
<td>Breakaway Sports</td>
<td>Sporting Equipment/Supplies</td>
<td>770-433-2357</td>
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<tr>
<td>Colter Sports</td>
<td>Sporting Equipment/Supplies</td>
<td>770-978-4239</td>
</tr>
<tr>
<td>Concept 2 Rowing</td>
<td>Indoor Rowing Machine Mfger</td>
<td>800-245-5676</td>
</tr>
<tr>
<td>Harrow Sports Inc</td>
<td>Sporting Equipment/Supplies</td>
<td>800-541-2905</td>
</tr>
<tr>
<td>Lacrosse Unlimited Institutional Sales</td>
<td>Equipment/Supplies/Clothing</td>
<td>800-366-5299</td>
</tr>
<tr>
<td>Lee Sports</td>
<td>Sporting Equipment/Supplies</td>
<td>770-554-2330</td>
</tr>
<tr>
<td>Rowing Repair Center</td>
<td>Restoration of Rowing Shells</td>
<td>865-482-1808</td>
</tr>
<tr>
<td>Ruggers Inc</td>
<td>Equipment/Supplies/Clothing</td>
<td>413-746-9554</td>
</tr>
<tr>
<td>Varsity Brands Inc</td>
<td>Cheerleader/Dance Team Uniforms</td>
<td>800-792-4337</td>
</tr>
<tr>
<td>Vespoli USA</td>
<td>Racing/Rowing Shells</td>
<td>203-773-0311</td>
</tr>
<tr>
<td>Web Design</td>
<td></td>
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</tr>
<tr>
<td>Cool Dog Interactive Inc</td>
<td>Web Site Development</td>
<td>404-522-1062</td>
</tr>
<tr>
<td>Red Clay Interactive</td>
<td>Web Site Development</td>
<td>770-297-2430</td>
</tr>
</tbody>
</table>

**HOW TO PAY?**

ALL paperwork MUST go through SGA. Do not have staff at your respective schools or departments deal with contracts or payments for your club.

Once you have attended an SGA training session, you are ready to start processing small dollar reimbursement vouchers, but the finance division requires that you take online training and successfully pass quizzes before they will grant you access to the Compass PeopleSoft system or Emory Express. Use the chart below to determine how to pay your particular expenditure.

Start early: it usually takes 2-3 weeks to cut a check.
### Small Dollar Reimbursement Vouchers

<table>
<thead>
<tr>
<th>Description</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used to reimburse club members who spent personal funds, totaling $75 or less, to make a purchase for your club</td>
<td>Process using the Small Dollar Reimbursement Voucher. You can find a pdf of the voucher at <a href="http://www.finance.emory.edu">www.finance.emory.edu</a> by clicking the “forms” link on the left side of the page. For further instructions see page 62.</td>
</tr>
</tbody>
</table>

### Expense Reports (PeopleSoft)

<table>
<thead>
<tr>
<th>Description</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used to reimburse club members or advisors who spent personal funds, totaling $75 or more, to make a purchase for the club</td>
<td>Process by logging onto PeopleSoft. See page 63 for further instructions.</td>
</tr>
<tr>
<td>Used to reimburse club members for club related travel expenses</td>
<td>NOTE: Travel Expenses can NOT be reimbursed until after the travel is complete</td>
</tr>
<tr>
<td>Used to reimburse guests for travel and/or other expenses</td>
<td>NOTE: Travel Expenses can NOT be reimbursed until after the travel is complete</td>
</tr>
</tbody>
</table>

### Payment Requests (PeopleSoft)

<table>
<thead>
<tr>
<th>Description</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used to process taxable income payments to individuals. This includes guest speakers, musicians, study participants, coaches, and referees.</td>
<td>Process by logging onto PeopleSoft. See page 66 for further instructions.</td>
</tr>
</tbody>
</table>

### Emory Express

<table>
<thead>
<tr>
<th>Description</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PUNCH-OUT:</strong> Used to order and pay for merchandise when one of the university’s preferred (contracted) vendors (see page 55) is used.</td>
<td>For your goods and services purchased via an Emory Express punch-out, payment to the supplier is processed directly from your account by Payment Services via Emory Express.</td>
</tr>
<tr>
<td><strong>NON-CATALOG FORM:</strong> Used to order from and pay one the non-contracted SGA approved vendor (page 58)</td>
<td>For your goods and services purchased via an Emory Express non-catalog form, payment to the supplier is processed directly from your account by Payment Services via Emory Express. See Blackboard for training Demo.</td>
</tr>
<tr>
<td><strong>INVOICE ATTACHED:</strong> Used to pay vendors (companies only; individuals are paid through payment request) for merchandise. This includes Emory’s preferred caterers and making donations to charities.</td>
<td>See the training demo at <a href="https://www.finance.emory.edu/procurement/express.cfm">https://www.finance.emory.edu/procurement/express.cfm</a></td>
</tr>
</tbody>
</table>

### Emory Purchasing Cards (P-cards)

<table>
<thead>
<tr>
<th>Description</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>An Emory Purchasing Card is the expected method of payment for purchases if $1,400 or less for: Professional Licenses/Certificates, Memberships, Registrations, and Subscriptions.</td>
<td>Contact your divisional treasurer to arrange to use his/her p-card. If necessary, you may also arrange to use a p-card in the SGA office (after checking with your divisional treasurer first).</td>
</tr>
</tbody>
</table>

Once you have keyed and printed out your paperwork, bring it (the original and a copy) straight to the SGA office in DUC 515- not to your divisional treasurer. We will then send your request to Payment Services and they will route it electronically to your divisional treasurers and the SGA treasurer/business manager for electronic approvals. This process usually takes 2-3 weeks.

Do not pay out of pocket to purchase supplies (over $75) for your club. **Use of Emory Express for supplies is mandatory.** Should a member purchase supplies with their personal funds, they will not be reimbursed. Furthermore, should a member purchase supplies directly with a supplier without an Emory University issued Purchase Order, Emory will not be held responsible for payment. Some examples of supplies

The finance division is cracking down on the use of preferred vendors. Not following these guidelines could mean that payment will NOT occur.
ordered through Emory Express are:

- Office supplies (paper, pens, etc.)
- Sports equipment and uniforms
- Promotional Supplies (give aways, t-shirts, caps, etc.)
- Printing (brochures, publications, mailings, etc.)

### HOW TO GAIN ACCESS TO THE COMPASS SYSTEM

As stated in the previous section, the finance division requires that you take online training and successfully pass quizzes before they will grant you access to PeopleSoft or Emory Express. They have created a Blackboard tutorial. To complete the tutorial and quizzes follow the instructions:

1. Go to Blackboard at Emory (https://classes.emory.edu) and log in using your Emory Network ID and password
2. Click on the “Community Tab”
3. Under the Organization Catalog, click on “Purchasing”
4. Next to Procurement and Payment Services SGA Training, Click on "Enroll", then “Submit” and then “OK”
5. You are now enrolled in SGA training. You need to go through each blue tab on the left column to complete this tutorial successfully. At the end you will be given a quiz to ensure successful comprehension of Procurement and Payment Services policies and procedures.

### SMALL DOLLAR REIMBURSEMENT VOUCHERS

Expense Report requests for under $75 will not be accepted; students must use the small dollar reimbursement voucher. This process will allow students to get small reimbursements right away by submitting the small dollar reimbursement voucher directly to SGA and then walking it to the Cashier’s Office to receive the cash reimbursement. Follow these steps:

1. Go to Finance Webpage.
2. Click the Procure & Pay Tab.
3. Under “Payment Services” click on “Small Dollar Reimbursement Voucher”.
4. Fill out the form electronically. Department Name should be Student Government Association and the Department Number should be 080200. You can add additional lines for different Smartkeys and accounts by handwriting them in, but remember to add all the receipts for one account together.
5. Make sure you fill in ALL blanks including a phone number where you can be reached at the bottom (remember all receipts can not add up to more than $75).
6. After filling out the form completely, hit print form. The Club treasurer should sign at the bottom right corner. If reimbursing the treasurer have the president sign off. The person reimbursed signs at B Jones.
7. Bring form to the SGA office between the hours of 8am-5:30pm for the authorized signature. Be sure to attach each ORIGINAL receipt by taping it down to a separate piece of paper just as you do for regular payment requests. You may tape as many receipts to one piece of paper as will fit.
8. Make two copies of the form and two copies of the receipts and leave in the SGA office for your divisional treasurer and your organization’s file folder.
9. After it is signed by SGA staff, you may walk the original form and receipts to the Cashier’s Office, located on the bottom floor of the B Jones building. You will need a photo ID and remember NOT to sign the form until you get to B. Jones. They will give you cash immediately.
Remember, if your receipts total more than $75, you must do a regular expense report request as outlined in the next section. For both regular reimbursements and small dollar vouchers, you should put all the receipts for each person (even if the receipts include different events and various accounts) on one form. Also, remember to specify the number of people when reimbursing for food and if less than 10 people, you must include their names.

Filing the expense reports described in the next few sections will be the primary and most time consuming function for most treasurers. You will follow this process when reimbursing yourself, your advisor, or a fellow club member for travel expense and/or regular out of pocket expenses (if they bought pizza for your club meeting). Remember, if the receipts total $75 or less, then you must use the Small Dollar Reimbursement Voucher described in the previous section. The Expense Report process is the same if you are reimbursing a guest of Emory, however, you do not have the minimum expense amount of $75 when you are reimbursing guests to campus.

Expenses are entered online and then turned in directly to the SGA office. You must always include an original itemized receipt or paid invoice, so that what you are paying for is clear. If you are using an invoice that has not been marked paid and updated to show a balance of zero, then you will need to include proof of payment in the form of a credit card slip/statement or canceled check/bank statement.

**Entering an Expense Report for Yourself or for Someone who has Given You Proxy**

Log on to [www.finance.emory.edu](http://www.finance.emory.edu) and Click Procure & Pay. Navigate to the People Soft Expense Reports page using the Quicklinks on your right. Log in there and then navigate to: Employee Self-Service > Travel and Expense Center > Expense Report > Create

1. On the **Add a New Value** tab, select your EmplID (or if you are entering for someone else click next to EmplID field and then the link for the person who has given you proxy to enter these expenses) and click See the next section for instructions on assigning proxy.

2. Select **A Blank Report** in the Quick Start field.

3. In the **General Information** section (see screen shot below), input
   a. Description- something meaningful to you to identify the report you are creating
   b. Business Purpose- select from the pull down menu.
   c. Destination: the airport code for your destination (if you are reimbursing for expenses and not travel, enter ATL)
   d. Comment- explain the purchase; include who, what, when, where, and why.
   e. Begin Date and End Date (date of receipt(s) not for travel)

4. Click **Accounting Defaults**
   a. Input SmartKey.
   b. Click **OK**.

5. On the **Details** grid, input
   a. Expense Type
   b. Expense Date
   c. Amount Spent
   d. Payment Type
6. Click **Data** and input any required information, such as Description. It is on this page that you will enter your ticket number if reimbursing for airfare and the number of participants if you are reimbursing for food.

7. Click **Accounting Data** and review/revise the account and/or Smartkey.

8. If you need to Charge the Expenses to multiple Smartkeys
   
   a. Input % and SmartKey for the first department.
   
   b. Click **Add ChartField Line** and input % and SmartKey for additional departments.

9. Click **OK** and then Click **Return to Expense Report**.

10. If necessary, continue adding additional expenses to the report by clicking the + sign to the right of the expense you have already added.

11. Answer the Foreign National questions.

12. Click **Check For Errors** and resolve errors, if necessary. Then Click **Save For Later**.

13. To view the Workflow Approval Map, click **Workflow Preview**.

14. Click **Submit** to submit the transaction into Workflow.

15. Click **Printer report with barcode**, and then print the report using your browser Print button. **Have the payee sign the expense report.**

16. **TAPE** (do not staple!) original, itemized receipts to an 8 ½ X 11 sheet of paper.

17. **PAPERCLIP** the receipts behind the barcoded Expense Report.

18. Take the printed report (make sure it has a bar code) and receipts (and a copy) to the SGA office in DUC 515. We will take the report to Payment Services and they will route it electronically to the appropriate approvers (your divisional treasurer, the SGA treasurer, and the SGA business manager).

**Other things to remember when filing an expense report:**

- We do not reimburse for gas. Instead we reimburse miles traveled at a rate of 55 cents/mile. Gas receipts from a personal auto require google/mapquest proof of distance traveled.
- You must specify the number of people when reimbursing food. If less than 10 people, you must include their names.
- **Payee must sign the expense report**
- Add receipts together if they fall under the same account and key on 1 line. Don't have 3 food receipts and key 3 expense line with account code 56515.
- See SGA travel Policy on page 70.
You can charge directly to your Smartkey if you use one of Emory’s Preferred Travel vendors/agencies. They offer Emory discounts. To read the university travel policy and to see Preferred Travel vendors/agencies, visit https://www.finance.emory.edu/travel/

- You can create the report to reimburse yourself but you cannot approve the request (organization president must at least sign the paper copy of your request)
- All reimbursements must be submitted within 3 weeks of date on receipt and travel reimbursements should be submitted within 10 days after the travel. All travel reimbursements must be sent to Payment Services within 30 days of the trip or you will not be reimbursed.
- All receipts must be itemized and show proof of payment
- It generally takes 2-3 weeks to get a check cut.
- You are welcome to use the SGA copier and computers for your financial business
- SGA can provide you with paperclips; we have a million
- Helpful Contacts related to travel:

<table>
<thead>
<tr>
<th>Jennifer Hulsey</th>
<th><a href="mailto:jennifer.hulsey@emory.edu">jennifer.hulsey@emory.edu</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Services Manager</td>
<td>404-727-8096</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Tascha Short</th>
<th><a href="mailto:tascha.short@emory.edu">tascha.short@emory.edu</a></th>
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<tbody>
<tr>
<td>Payment Services Supervisor</td>
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<table>
<thead>
<tr>
<th>Gwendolyn Stephens</th>
<th><a href="mailto:gajacks@emory.edu">gajacks@emory.edu</a></th>
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</thead>
<tbody>
<tr>
<td>Travel Reimbursement Specialist</td>
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<table>
<thead>
<tr>
<th>BCD Travel</th>
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<table>
<thead>
<tr>
<th>Carlson Wagonlit</th>
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<table>
<thead>
<tr>
<th>Travelocity Business</th>
<th>404-727-3000, press 2</th>
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</table>

<table>
<thead>
<tr>
<th>Maupin Travel</th>
<th>1-800-341-7440</th>
</tr>
</thead>
</table>

**How to Authorize a Proxy**

You will need to have your fellow club members follow these steps before you process a reimbursement on their behalf. Once logged into People Soft: Navigate to Employee Self-Service > Travel and Expenses > User Preferences > Delegate Entry Authority

1. On the **Authorize Users** page, click at the end of a row.
2. Enter the proxy’s PeopleSoft User ID in the **Authorized User ID** field.
3. Click next to the proxy’s User ID.
4. Click the **User ID** link.
5. Click **Save** and then **OK**.
This process is paying an unincorporated company or an individual for services rendered (e.g. Party D.J., speaker at an event, or musician). Please note: that you should never pay this type of payment out of pocket and hope to get reimbursed. Because this payment is taxable income for the person performing the service, we will not be able to reimburse anyone who paid out of pocket. Checks must be cut directly to the individual performing the service.

This request will include an itemized invoice or (most likely) a contract instead of an itemized receipt. If the person/vendor is not in the system (has not been paid by Emory in the past year) then you will need to include a W-9 (page 91). Keep your deadline in mind; contracts can take several weeks to be approved (see page 29).

If you are paying an Emory faculty of staff member, then you will need to contact Meredith Honeycutt at 404-727-3513. This requires a different process.

**Enter Self-Service Payment Request**

Once in PeopleSoft Navigate to: Accounts Payable > Vouchers > Add/Update > Regular Entry

1. Click **Add** on the **Add a New Value** tab.

2. On the **Emory Payment Request** page, input
   a. Invoice Number: something meaningful to you
   b. Invoice Date
   c. Total: the total amount of the requested payment

3. Input Vendor ID, if known. If not known, conduct a search.
   a. Click **Advanced Vendor Search**
   b. Input one or more search criteria (Name, City, State, Postal, ShortName, Type or Class).
   c. Click **Search**.

4. If the individual is listed in the search results, click **X** to populate vendor information on the **Emory Payment Request** page.

5. If the individual is not listed in the search results,
   a. Click **Back to Header**
   b. On the Emory Payment Request Tab page, Click **New Vendor**.
   c. Enter the individual’s name and address.
   d. Click the **Emory Payment Request** tab.

6. The **Payment Handling** field defaults to a check mailed by regular mail. The method can be changed with a valid business reason.

7. If Emory will pay a speaker’s expenses,
   a. Click **Expenses to be Paid?**
   b. Enter the speaker’s first and last names.
c. Click OK.

NOTE: This sets you up as a proxy and allows you to complete an Expense Report on the speaker’s behalf.

8. Answer the Foreign National questions.

9. In the Distribution Lines grid, input
   a. SmartKey and Account

10. Click OK. Click to the question about waiting for the process to be completed.

11. When the Summary page displays,
   a. Write down the Voucher ID.
   b. Verify the Budget Status is Valid.

12. To view the Workflow Approval Map, click .

13. Click on the Summary tab to submit the transaction into Workflow.

14. To print a copy of the invoice
   a. Click on the Emory Payment Request tab.
   b. Use the browser Print button to print the invoice.
   c. Click to close the new window.

15. Include the invoice or a contract signed by the payee and the appropriate Emory representative (see page 29 for more on Contracts) and W-9 if necessary by paper clipping them behind the Payment Request form.

16. Take the barcoded Payment Request form and supporting documentation (plus a copy) straight to SGA in DUC 515- not to your divisional treasurer. We will then send the packet to Payment Services and they will route it electronically to divisional treasurers and SGA treasurer/business manager for electronic approvals.

    *Reminder: If Emory is paying the individual’s expenses, create an Expense Report to request payment as described in the previous section. If you remembered to Click , the payees information will be waiting when you log in to key the Expense Report.

**More tips on paying an artist/performer**

- Start early. It generally takes 2-3 weeks to get a check cut but when contracts are involved you should count on the request taking at least 6 weeks.
- Follow the contracts procedure and allow plenty of time. *NOTE: Students are NOT allowed to sign contracts* (see section on contracts on page 29). It is your responsibility to follow up with the office that you choose to work with on the contract. You should pick the contract up from that office once it has been signed and make sure the request makes it to SGA.
- Enter the request into the system as soon as you have the signed contract and W-9.
- Don’t forget to pick up the check if you coded them for Pickup! Checks coded for pick up will be available at the 1599 building. NOTE: Payment Services is restricting check pickup so you must enter an acceptable reason if you choose PU as your disposition. Example: According to contract, check to be handed to speaker, performer, referee, etc., at end of lecture, performance, game.
Never pay a performer until after they have completed their performance and **NEVER** pay them out of pocket.

- You are welcome to use the SGA copier and computers for your financial business.
- SGA can provide you with paperclips; we have a million.

## PAYING VENDORS: EMORY EXPRESS

Emory Express is housed in the "Emory Marketplace" section of the finance website. "Emory Marketplace" provides you with your resources for your Purchasing and Payment needs as well as training tools, demos, and announcements from our many suppliers and more. Emory Express allows you to shop for and purchase your supplies and equipment. Emory Express automatically routes your requisition (order) through your departmental approvals, creates a Purchase Order and then pays the supplier for you when you order from one of the preferred/contracted vendors. These Vendor payments are generally processed through Emory Express Punch-outs. Emory Express is also used to pay companies (non-individuals) for goods not procured through Emory Express using the Invoice Attached option. Entries into Emory Express will be interfaced to PeopleSoft for payment. For Invoice Attached you must have an itemized invoice or contract. If the vendor is not in the system (has not been paid by Emory in the past year) then you will need to include a W-9 (page 91). Keep your deadline in mind; contracts can take several weeks to be approved (see page 29 for more information on contracts). For complete instructions on the Emory Express system, read the Emory Express manual located online at: 

**To make a purchase or initiate a payment on Emory Express**

1. Complete the finance division training and quizzes to get set up into the system
2. Once the finance division has loaded you into the system, log on to [www.finance.emory.edu](http://www.finance.emory.edu)
3. Sign in with your Emory username and password (should be the same as OPUS)
4. Select Emory Express from the finance shortcuts on the top left of the page
5. Click the Emory Express Logo to enter into the Emory Express System
6. You may want to update the address, e-mail preferences, default Smartkey, etc in your Profile (link is located in the header on the top left of the Emory Express screen).
7. When you are ready to place your order or initiate your payment, you will need to decide whether you are using a Punch-out (for placing orders with most of the preferred/contracted vendors), the Non-Catalog Form (for the SGA approved vendors and preferred printers), or the Invoice Attached option (for initiating payment to vendors that do not have Punch outs available- our preferred caterers for example- remember you must use a preferred vendor or an approved vendor in many categories (page 55) or payment may not be possible
   a. If you will be using a punch-out, click your chosen supplier icon and you will be directed to the vendor website to make your product selections then back into Emory Express to enter your contact information and Smartkey number. Once a punch-out item is placed in the Express shopping cart, the quantity cannot be changed. Confirm the quantity before placing a punch-out item
into the Express shopping cart. Read more about the punch-out process in the Emory Express manual

b. If you will be using the Non-catalog items Form on Emory Express, Select Non-Catalog Item from the small menu at the top center of the Express page.

   and choose a supplier from the system. You will then fill in the product, quantity, and pricing information. See the Blackboard tutorial for further information.

c. If you will be using the Invoice Attached option, make sure you have the itemized invoice and/or signed contract in hand. You will need to create a separate requisition (request for payment to a vendor) for each invoice you have. Follow the instructions in the Invoice Attached Demo found online at:

https://www.finance.emory.edu/procurement/demo/4INVOICE%20ATTACHED_demo/4INVOICE%20ATTACHED_demo.htm

8. After filling your cart in one of the above manners, you will be taken back to your Emory Express cart, which you can edit if necessary.

9. You will then click the Review button (next to the Edit Cart button). Here, you will put in your Smartkey(s) and appropriate account codes and attach any necessary paperwork (invoice, quote, W-9). Print this page.

10. You will then hit the Place Order button to send your requisition to your authorized approvers. Print this page too

11. Paperclip in the following order:
   - Original form (from Step 9) printed from Emory Express
   - Original form (from Step 10) printed from Emory Express
   - Original Invoice or Contract (and W-9 if paying a new vendor)
   - Copy of Forms
   - Copy of Invoice or Contract and W-9

12. Bring paperwork to SGA office to be filed in your organization’s folder

Need Help: email e-market@emory.edu or call the customer support center at 404-727-5400

Again Remember:

- You must specify the number of people when reimbursing food. If less than 10 people, you must include their names.
- All invoices must be itemized
- Start early. It generally takes 2-3 weeks to get a check cut but when contracts are involved you should count on the request taking at least 6 weeks.
- Follow the contracts procedure and allow plenty of time. *NOTE: Students are NOT allowed to sign contracts (see section on contracts on page 29). It is your responsibility to follow up with the office that you choose to work with on the contract. You should pick the contract up from that office once it has been signed and make sure the request makes it to SGA.
- Enter the request into the system as soon as you have the itemized invoice or the signed contract and W-9 (if needed).
- Orders $1500 and over will require and additional step. Read the Emory Express manual to learn how to receive your order so that payment will be made.
- You are welcome to use the SGA copier and computers for you financial business
- SGA can provide you with paperclips; we have a million
- Paperwork comes straight to SGA in DUC 515- not to your divisional treasurer. We will then send to Payment Services and they will route it electronically to divisional treasurers and SGA treasurer/business manager for electronic approvals.

## TRAVEL POLICY

**Rules for Travel:**

1. Only two people may travel with SAF money unless your divisional council approves otherwise.
2. Reimbursement (Expense Reports) requests must be submitted within 10 days after travel.
3. Original itemized receipts for all expenses must be included with request forms. Emory requires the zero balance due hotel folio for reimbursement.
4. Meals may only be reimbursed by self-generated funds.
5. Costs from failure to complete plans will not be reimbursed.
6. In order to pay registration fees in advance, an itemized invoice must be submitted to your divisional treasurer. He or she can then change those fees to the divisional P-card.
7. No reimbursements will be made until after travel occurs.
8. Travel in a private car will be reimbursed at $0.55 per mile as determined by an atlas or Internet mapping program. This must be submitted on a travel expense form.
9. If your travel will require using university owned or leased vehicles, please see the section entitled “Defensive Driving” on page 45.

To read the University travel policy see: [https://www.finance.emory.edu/](https://www.finance.emory.edu/) and click the travel tab.

## CHARGING DIRECTLY TO A SMARTKEY

One advantage to using services within the University is direct billing. Emory will not cut a check to an Emory entity so you use the direct billing method to pay Emory. Charging directly to your club’s Smartkey is allowed at Campus Services, Campus Printing, Emory University Bookstore, Emory Post Office, Worldwide Travel, Network Communications, and Campus Dining Services (Sodexho).

**Bookstore**
Take purchases to the register and tell the clerk that it is a departmental charge. They will give you a form to fill out which includes the organizations name and Smartkey number. You **MUST** take your Emory ID with you.

**Campus Dining Services**
Food may be charged through [Campus Dining](https://www.campusdining.emory.edu/) if it is ordered in person at Campus Dining Services in Cox Hall at least 24 hours in advance or through Catering (404-712-8948). Food from Einstein’s may also be charged. Again, you **MUST** take your Emory ID with you.

**Campus Printing**
Emory's Campus Printing offers a full range of services including fast photocopying in black and white or color up to 11x17 in size, Letterhead, Business Cards, Stuffing, Labels and Labeling, Flyers, and many other specialty jobs. Contact them at 404-727-6859 (DUC Terraces) or 404-727-5905 (Rollins Research Building)

**Campus Services**
Work done by Campus Services (formerly known as Facilities Management or FMD) during normal business hours (Monday-Friday, 9am-5pm) will generally not be charged if you identify yourself as a student organization. Work done on weekends and after hours will be charged to your Smartkey after you fill out a [Work Request](http://www.fm.emory.edu/), which can be found at [http://www.fm.emory.edu/](http://www.fm.emory.edu/)
Emory Post Office
In order to charge at the Post Office, you must fill out a postal charge form that can be picked up at the Post Office window. The SGA Business Manager must sign this.

Enterprise Van Rental
Emory University has a contract with Enterprise. Enterprise will have cars and 15 passenger vans on site at the Emory Conference Center. The hours of operation are 7:00am-6pm Monday-Friday and 9am-noon on Saturday. If you have questions or wish to reserve a vehicle please contact 727-8267.

*Remember, charging directly to your Smartkey is the best way to pay for your van rental.

Also see the section on the Defensive Driving Program (page 45).

Network Communications
Phone lines, voice-mail, data connections, and other services provided by Network Communications will be charged directly to student organization Smartkeys.

*Please be aware that your club may have an ongoing network communications charge. Many groups are not aware that they have services through NetCom (i.e. voice-mail) or that they are being charged for them (even in the summer). If your club is being charged for voice mail or network services and you are NOT using them, please let NetCom know so they can discontinue the service and you won’t be charged for services you are not utilizing.

Travel
For those clubs with travel funds, tickets can be charged through the preferred travel vendors (727-3000) by either the president or the treasurer. The purchaser must also pick up the tickets. Research prices and book online at https://www.finance.emory.edu/travel/

Gifts, Flowers and Prizes
The Divisional and SGA VP for Finance must approve the purchase of flowers and gifts with the student activity fee. Self-generated money may be used without permission for these purposes. If permission is not issued, money will be automatically deducted from the self-generated funds. Flowers may be purchased for decoration and prizes may be purchased for contests.

Audiovisual and Computer Equipment Rental
To rent audiovisual equipment contact Classroom Technologies at 727-5147. Reservations are subject to valid Smartkey numbers and all equipment must be picked up and returned by the organization. Equipment is rented on a first-come first-serve basis and can only be used for academic and non-commercial activities. Computer equipment is available through the Cox Hall Computer lab.

Video Rental
It is illegal to show a rented movie in a public setting. Because of this, films can not be rented with University money and will not be reimbursed. See section on “movies and copyrighted materials” on page 33.

Alcohol
SGA and College Council do not allow clubs chartered under the College Council to purchase alcohol with club money (allocated or self-generated) and will not approve any reimbursement requests that include alcohol. All clubs must follow the alcohol policy.

Food
You must specify the number of people when reimbursing food. If less than 10 people, you must include their names.
BOOKKEEPING ISSUES

Relines
Relines reallocate money that had been dedicated for one purpose to another. Use the reline form to move money from one account to another. The divisional treasurers and the SGA coordinate relines. See page 89.

Transfers
Transfers occur when one organization agrees to pay an expense of another organization. Transfers move money from one student organization’s fund to another group’s fund. Internal Transfer forms must be filled out in order to transfer money. See page 90 and remember you can not move allocated funds into a self-gen Smartkey.

Going in the Red
If your organization goes into debt at the end of the academic year, it will be required to self-generate all overused funds by the end of the following fall semester. If the refund is not met, the organization’s charter may be revoked. Plan well- Do not Ever go into the Red!

Rush Checks
Payment Services will no longer rush a check.

FORMS

Most Finance forms can be found at
https://www.finance.emory.edu/external/forms/index.cfm

Most every other form, or a link to the form, can be found electronically at
www.osls.emory.edu/eaglesource
Sample Constitution

OSLS and SGA GUIDELINES FOR STUDENT ORGANIZATION’S CONSTITUTION

All student organizations chartered by the Student Government Association will be required to submit a constitution and/or by-laws annually when they re-register, beginning January 2010, even if the Constitution has not changed in order to ensure that the organization has a copy for regular referral. The constitution serves as the governing document for the organization. This information is kept on file in the SGA Offices, 515E Dobbs University Center, and is available to students upon request.

It is recommended that each officer of your organization have an up-to-date copy of the constitution and by-laws. Additionally, all members of the organization should be familiar with the document. This information will help to ensure that all members are aware of how the organizations functions. If your organization does not currently have a copy of its constitution and by-laws available, please contact the SGA Attorney General at sgaattorneygeneral@learnlink.emory.edu to obtain the most recent copy SGA has on file.

If you need any additional information or if you have any questions, please do not hesitate to contact the Office of Student Leadership & Service, 340E DUC at 404.727.6169 or the SGA Business Office, 515E DUC at 404.727.6179.

CONSTITUTION STRUCTURE    (**DENOTES REQUIRED SECTIONS OF CONSTITUTION)

Preamble
We the members of NAME OF ORGANIZATION subscribe to the regulations and policies of Emory University, the Emory University Student Government Association, and the NAME OF DIVISION, do hereby establish this Constitution to govern the matters within our organization.

ARTICLE I: Name***
   a. The name of this organization or association is: please provide the full, official name of the organization, as well as any acronyms the organizations may use.
   b. This is the appropriate place to list any national or local affiliations.

ARTICLE II: Purpose/Mission***
Enter a comprehensive, yet concise statement of purpose. This statement may have several ideas or objectives. Be as precise as possible, as this statement outlines the overarching objectives of your organization.

   a. The purpose/mission of ___________________________ shall be____________________________.

ARTICLE III: Membership***
This article should include a sufficient number of sections to cover all information and requirements about membership including, but not limited to: types (active, associate, honorary, and others), qualifications (grade point average, areas of interest, etc.), election or selection, and method of application. Must state that membership is open to all members of the Emory University community. It may limit the number of members or contain other provisions relating to members.

This article MUST include the Emory University Non-Discrimination Clause: NAME OF ORGANIZATION is dedicated to the Emory University equal opportunity policy, which provides that applicants will not be discriminated against on the basis of race, color, religion, ethnic or national origin, gender, age, disability, sexual orientation, veteran's status, or any factor that is a prohibited consideration under applicable law. (Few exceptions MAY be granted to certain groups (i.e. religious, men/women, etc...) at the discretion of the SGA Attorney General)

Other Included in an appropriate Article or Articles shall be information as follows:
   a. Membership shall be limited to regularly enrolled Emory University students, faculty, and/or staff members.
   b. Any dues or payment necessary to be a member of the organization (when dues are collected: yearly, semesterly, etc.)

ARTICLE IV: Officers***
This section should contain the officer positions, qualifications, duties, the duration of terms, election, and removal. This list must contain an officer who is responsible for the organization’s activities (i.e. President) and an officer who is responsible for
the financial obligations and accountability of the organization (Treasurer). All officers must be enrolled in credit hours at Emory University. Additionally, provisions should be made for election, removal, and vacancy of office (typically accomplished through voting).

Note: *Names should never appear in the constitution, only the positions.*

  a. The officers of this organization shall consist of: (state the number of officers, their titles, and their general duties and responsibilities. Officers must be Emory University students).
  b. Qualifications for office, if any (GPA, previous experience, etc.).
  c. Terms of office (state the period of time that an office will be held).
  d. Term limits (state the number of terms that an individual may be allowed to hold a particular office)
  e. Election (state the method and frequency of electing officers, as well as vote required to take office)
  f. Provisions for removal (state how an officer is removed, how the process is initiated, voting requirements, and what steps for an appeal).
  g. Provisions for officer vacancies

ARTICLE V: Executive Committee
This Article may provide for a governing Board of Directors, or Executive Committee, and the method for establishing the committee. This board can consist of the officers. If no board is desired, then omit this article.

ARTICLE VI: Meetings***
This article should state the provisions for setting up a regular meeting time and frequency of meetings, any provisions to be made for calling a special meeting, and stipulations for quorum; the officer position which has the authority to call meetings should also be stated here.

Note: *Locations and/or specific dates should not be listed here as they are typically subject to change.*

  a. Meetings shall be held (weekly, bi-weekly, monthly, etc.; specify person responsible for notifying members of upcoming meetings and method of notification).
  b. Stipulations for quorum (a quorum shall consist of (x) voting members or a percentage of voting members present at any meeting). A quorum is defined as the number or percentage of total membership to be present at a meeting in order to conduct the business of the organization (elections, amendments, fiscal decisions, etc.)

ARTICLE VII: Amendments***
Amending the constitution should not be too simple a process for the sake of the stability of the organization. All amendments must be decided on carefully; it is recommended that all amendments are subject for final approval by the general membership of the organization.

  a. The constitution may be amended by a vote of (be specific—majority, 2/3, etc. be sure to include any requirements for the form/manner in which the amendment is written, process for presenting and/or ratifying an amendment, and what margin of votes an amendment shall be required to receive for passage).

BY-LAWS:
Bylaws are not a necessary requirement for your constitution; however, they do provide the opportunity to be more specific regarding constitutional requirements. Typically bylaws are intended to establish rules or procedures necessary to carry out the constitution. It is important to note that your bylaws must not change, amend, or conflict with your constitution.

1. More detailed material concerning members, rights, duties expulsion, and resignation procedure.
2. Provisions for honorary members/associate members, if the group so desires.
3. Provisions for membership fee, dues and assessments, if there are to by any, should be set down in detail.
4. Detailed description of the officer positions, if desired.
5. Duties, authority, and responsibility of the Executive Committee.
6. Name of the standing committees, if any, and the method of selection of committee chair:
   a. The duties of the committee(s) should also be stated.
   b. Provisions for creation of new committees
7. A provision for some accepted rules of order for parliamentary procedure (i.e. Robert’s Rules of Order).
   A method to amend the by-laws, typically a majority vote (**Required should you choose to have bylaws).
Contract Review Cover Sheet for SGA Student Organizations (page 1 of 2)  
Complete one form for each contract

Sponsoring organization: ________________________________
Organization contact person: ________________________________
Organization contact phone: ________________________________
Organization contact email address: ________________________________

Name of vendor/ performer: ________________________________
Circle one:    vendor    performer    speaker    site
Vendor/Performer/Agency/Company contact person: ________________________________
Contact phone: ___________________  Contacts Fax: __________________  Contact Email: __________________

Date/ time of event: ________________________________
Location of event: ________________________________

For the Event Planner for the Organization:
Have you contacted Emory Police Department to get a security estimate? What did they recommend?
____________________________________________________________________________
(Contact Lt. Elliot at celliot@emory.edu or 404-727-6115)

Have you reserved your location for the event?  ☐ Yes  ☐ No  ☐ This contract is for the location

Additional Information that will assist our office in processing your contract:
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
**Contract Review Cover Sheet for SGA Student Organizations (page 2 of 2)**

*For the Treasurer of the Organization to Complete:*

Cost of the Vendor: ____________ Current Payment Due Date: _____________________

Is there a deposit required?  ☐ Yes  ☐ No  If yes, due date: _____________________

Will gratuity be applied/how much? ________________ (this typically only applies to hotel/banquet/catering contracts)

Where is your funding coming from? Please be specific, indicate all sources, and amounts:

Are you requesting supplemental funding from an SGA Division?  ☐ Yes  ☐ No

Have you written the bill?  ☐ Yes  ☐ No

Have you gotten the funding/bill approved?  ☐ Yes  ☐ No

We certify that we have consulted the Eagle Source for all information relevant to our event ([www.osls.emory.edu/eaglesource](http://www.osls.emory.edu/eaglesource)). Additionally, we certify that we have the money to secure payment for this contract. In the event that we do not, we understand that we will be responsible for all policies related to SGA, our Divisional Council, and Emory University related to repayment and generation of money to cover the debt.

**SIGNED:**

____________________________________   ________________________   _____________
Event Organizer     Print Name   Date

____________________________________   ________________________   _____________
Organization Treasurer    Print Name   Date

____________________________________   ________________________   _____________
Organization President    Print Name   Date

**OFFICE STAFF USE:**

Date contract was received:  ________________________________

Staff member assigned to contract:  ________________________________

Check when complete:  Date:

☐ Reviewed by staff
☐ Sent to Legal Counsel for review (if necessary)   __________
☐ Changes returned from Legal Counsel (if necessary)   __________
☐ Changes sent to agency   __________
☐ Contract changes and negotiations complete   __________
☐ Completed contract sent to agency   __________
☐ Organization asked to pick up contract   __________
ASP Alert Form for Student Organizations

Complete one form for each Artist, Speaker, or Performer of any kind that is performing or speaking for free, and/or does not require a contract.

Sponsoring organization: ____________________________ Organization contact person: ____________________________

Organization contact phone: ____________________________ Organization contact email address: ____________________________

Name of vendor/performer: ____________________________ Name of Contact: ____________________________

Circle one: vendor  performer  speaker  site  other: ____________________________

Contact phone: ____________________________ Contact Fax: ____________________________ Contact Email: ____________________________

Date/time of event: ____________________________

Location of event: ____________________________

For the Event Planner for the Organization:
Have you contacted Emory Police Department to get a security estimate? What did they recommend?
_____________________________________________________________________________
(Contact Lt. Elliott at celliot@emory.edu or 404-727-6115)

Have you reserved your location for the event? ☐ Yes ☐ No ☐ This contract is for the location
_____________________________________________________________________________

For the Treasurer of the Organization to Complete:
Are you prepared and/or able to pay for costs of the security recommended by EPD? ☐ Yes ☐ No

Where will the money be coming from to provide security, if required? (Allocated Funds, Supplemental Funding through your Division, Self-Generated, etc…?)

_____________________________________________________________________________

We certify that we have consulted the Eagle Source (www.osls.emory.edu/eaglesource) for all information relevant to our event and are prepared to take the necessary steps to ensure the event is safe and a success.

SIGNED:

Event Organizer ____________________________ Print Name ____________________________ Date ____________________________

Organization Treasurer ____________________________ Print Name ____________________________ Date ____________________________

Organization President ____________________________ Print Name ____________________________ Date ____________________________

OFFICE STAFF USE: Date ASP Alert was received: ____________________________
**Budget Worksheet**

This worksheet is intended to assist student organizations with planning a successful event. This worksheet should be kept in a safe place and passed from one officer to the next for continuity. Below, various possible expenditures are listed. Depending on the size of the event, some expenditures may be applicable, while others are not. Personalize this sheet for your event.

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Amount budgeted</th>
<th>Actual cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Space</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Space Rental (location: )</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Decorations</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Equipment rentals (tents, trash cans, etc.)</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Reception Costs</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Tables, chairs, table cloths, etc.</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Food &amp; drinks</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Other:</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td><strong>Artist Expenses</strong></td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Artist Honorarium/ Speaker Fee</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Production Costs (stage, lights, curtains, etc.)</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Audio Visual equipment</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Audio Visual staff costs</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Police/Security (always let EPD know)</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Other:</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td><strong>Travel Expenses</strong></td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Air travel costs</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Ground transportation costs</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Hotel/lodging</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Gas</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Food</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td><strong>Publicity</strong></td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Print (flyers, posters, handbills, etc.)</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Wheel Ad, WMRE, etc.</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Banners</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Programs</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$</td>
<td>- $</td>
</tr>
</tbody>
</table>

**Expected Sources of Income**

<table>
<thead>
<tr>
<th>Expected Sources of Income</th>
<th>Amount budgeted</th>
<th>Actual cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Co-Sponsorships (list source &amp; amount):</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td>Other sources:</td>
<td>$</td>
<td>- $</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$</td>
<td>- $</td>
</tr>
</tbody>
</table>
**Event Planning Checklists**

**How do I know if my event is a small-scale event?**

**Small Scale Events** include fundraiser events, workshops, training activities, tabling for recruitment and information distribution, trips for members of your organization, and/or performance showcases. These events usually take 2-4 weeks to plan. Make sure that your treasurer is involved with planning your event. Use the **Small/Medium Scale Event Planner & the Budget Worksheet** to assist you in the creation of a successful event!

**How do I know if my event is a medium-scale event?**

**Medium Scale events** require some security and will have less than 200 people in attendance. Planning for a medium sized event can aided by using the **Small/Medium Scale Event Planner & the Budget Worksheet**. Make sure that your treasurer is involved with planning your event.

Planning for such an event may require the signing of legally binding contracts. Under no circumstances are students permitted to sign contracts on behalf of his/her organization or any part of Emory University. It's important that you allow adequate time (at least 4 weeks prior to your event) to work with the appropriate office to get your contract signed. Only individuals in those offices may sign a contract for a student organization.

**What is a large-scale event?**

**Large Scale Events** include events within the ordinary scope of the student organization (e.g. lectures, debates, or other programs) which require a significant amount of additional planning and coordination. Your Advisor, treasurer and a staff member from OSLS should be involved with the planning of your large-scale event.

These events usually involved a well-known lecturer or performer (whom we will call ‘an ARTIST’) and also have an expected attendance of more than 200 people. Planning for such an event may require the signing of legal contracts. Under no circumstances are students permitted to sign contracts on behalf of their organization or any part of Emory University. It’s important that you allow adequate time (at least 6 weeks prior to your event) to work with the appropriate office to get your contract signed.

Large-scale events require security. Artists who are considered high profile or controversial will likely require additional security. The leaders within the hosting student organizations must speak with the Emory Police Department at least 6 weeks before the event. This will help you budget for your event and ensure that your event can take place safely.

Planning for an event of this size usually requires work to begin at least 12 weeks (possibly more) prior to the event. **Work with a staff member from the OSLS to help make your event a success. Please see our Large Scale Event Planner & Budget Worksheet to get started working on your event.** For a large event, we recommend using that planner no less than 3-4 months in advance.
Small/Medium Event Planning Checklist

Use this checklist to plan your event. Though each event is different, we generally recommend that for a small/medium event, you start at least **3-8 weeks** in advance. The checklist below is based on an 8 week planning timeline.

**8 Weeks prior to your event...**
- Select a date and time for your event and have backups. Select a location and reserve the necessary rooms. Consider reserving a rain location.
- Form a committee, if necessary, and delegate tasks. Organize a complete timeline of tasks specific to your event, including deadlines. Delegate these tasks to individuals.
- Evaluate your budget to determine how you can spend your money—use the budget worksheet! Make sure that you work with your treasurer, and that they are involved the entire time. Before you approach your division for supplemental funding, be sure to get a security estimate (see final bullet point in this section).
- If your artist is likely to be considered controversial, review the section of the Eagle Source entitled, “**Student-Invited Speakers**” and make an appointment to discuss this with an OSLS staff member.
- If you will be bringing a band/group, speakers, performers, DJs, and/or other entertainers—please use the/refer to the section of the Eagle Source entitled, “Finding & Bringing an Artist to Emory.” Consult OSLS for clarification, if necessary.
- Contact Lt. Finley of the Emory Police Department (404-727-8005) to inform them of the event. If necessary, you may also need to request security guards for the event. Get EPD’s expertise on if security is needed – do not rely on your own assessment as they think about risk differently than most of us do.

**6 Weeks prior to your event...**
- Get Contracts (for paid artists/speakers/performers) or ASP Alert Forms (for free artists, speakers, or performers) to the Office of Student Leadership & Service (or other appropriate office – see the Contracts subsection of the Eagle Source). The ASP Alert Form requires officer signatures as well as the security estimate given to you by EPD. Along with a Contract you must bring a Contract Cover Sheet that has the same requirements as the ASP Alert Form and a clean copy of the contract.
- Determine staging and sound requirements and make arrangements (discuss all possible options with your advisor and Meeting Services)
- Request any departmental co sponsorships necessary for your event to occur. In addition to money, what else can be contributed?
- Decide if your event will be open to the Atlanta community or just the Emory community. This may, or may not, impact the level of security present at your event.
- Request funding from other student organization. If you’ll need funding from College Council, submit your funding request bill. Funds requested from SGA must be request at least 35 days in advance.
- If applicable: Contact Campus Services (404-727-7468) for setting up, cleaning up needs and special furniture. The organization is responsible for set-up, clean-up and any applicable fees.
- If applicable: Inquire with your venue regarding food guidelines (must you use their service, can you bring in outside food?) Make any necessary food arrangements
- If applicable: If you would like the event to involve alcohol, please review the section of this guide entitled “Purchasing Alcohol”. Submit your Event Registration form at this time to avoid a last minute rush.
  - Beware, alcohol increases the cost of your event, requires EmoryCard readers, security, and your advisor to be present when alcohol is served. Emory EMS may also need to be present. Student organizations chartered under College Council are not permitted to serve alcohol at any function.
4 Weeks prior to your event...
- Develop a marketing plan- how will people find out about your event? Do not depend solely on LearnLink flyers. Instead, think of innovative means to inform people about your event.
- Invite your advisor to attend your event.
- Contact campus media outlets such as, The Emory Wheel, the Emory Events calendar and WMRE.
- Inform any academic departments that may be related to the subject matter of your event.
- If applicable: give contracts to the appropriate office (OMPS, OSLS, OSFL or Residence Life) at least 4 weeks in advance. All speakers, bands, and artists should have a contract...even if they are free!
- If applicable: arrange travel and lodging for your Artist.

2 Weeks prior to your event...
- Begin to publicize your event (LearnLink flyers, paper flyers, bulletin boards, table tents, banners, etc.) Try to use innovative means to inform people about your event.
- Order food from the campus dining at least 14 days in advance.
- If using tickets, review the DUC ticketing guidelines and the SGA guidelines for selling tickets.
- Create a schedule of tasks for each day of the “week of” your event; make sure that specific responsibilities are delegated to members of your committee.
- Confirm all plans for your event (location, food, etc.)
- Will you need special parking access or accommodations? If so, contact Parking Services at 404-727-7275.
- Submit check requests so that all bills & artists are paid on time.

After your event...
- Fill out a program evaluation form & make sure that it gets passed on to the appropriate person in your organization. This sort of record keeping will ensure success within the organization, even after you are gone!
- Send thank you notes to each department/organization that helped make the event possible. Be sure to include your advisor and members of your organization!
Large Event Planning Checklist

Use this checklist to plan your event. Though each event is different, we generally recommend that for a large-scale event, you start at least 3-4 months in advance. The checklist below is based on a 16 week planning timeline.

16 Weeks prior to your event...
- Select a date and time for your event and have backups.
- Form a committee of people who are interested in helping to make this event happen.
- Get estimates of costs related to set up, clean up, any staging or equipment costs, security, food, location fees, etc. Use the Budget Worksheet. **You must have an accurate idea of your expenses.** Evaluate your budget to determine how you can spend your money- make sure that you are communicating often with your treasurer.
- Select a location and reserve the necessary rooms or other venues. Reserve a rain location if necessary.
- To bring a band/group, speakers, performers, DJs, and/or other entertainers, please refer to the section of the Eagle Source entitled, "Finding & Bringing an Artist to Emory" and the section entitled, “Next Steps.” Follow the steps outlined and consult OSLS for clarification, if necessary.
- Once you have an accurate idea of the expenses, realize that if you will need to do significant fundraising, you must decide if this event can realistically occur as you’ve planned.
- Review the **Speakers Policy** in the Student Invited Speakers section and make an appointment to discuss this with an OSLS staff member.
- Decide if your event will be open to the Atlanta community or just the Emory community. This may, or may not, impact the level of security present at your event.
- Contact Lt. Finley of the Emory Police Department (404-727-8005) to inform them of the event. If necessary, you may also need to request security guards for the event. Get EPD’s expertise on if security is needed – do not rely on your own assessment as they think about risk differently than most of us do.

14 Weeks prior to your event...
- What is your plan for raising the additional funds needed? What will you do if the plan does not go as planned? Once you have submitted an offer, you must fulfill the contract, even if you cancel the event.
- After you’ve researched your Artist, make an appointment to speak to an OSLS staff member. He or she will ask you about the details of your event and help determine if you are ready to submit an offer. **Please proceed to the steps below after an offer has been submitted and accepted!**
- Reserve staging and sound requirements and make arrangements (discuss all possible options with your advisor and Meeting Services). Consult OSLS to hire a production company, if necessary.
- Is your Artist supposed to meet with specific individuals on campus? If so, reserve a space for those meetings and inform all participants of the time and location of the meeting.
- Request funding from other student organizations. If you’ll need funding from College Council, submit your funding request bill. Funds requested from SGA must be request at least 35 days in advance.
- If applicable: Make travel, food and lodging arrangements.
- Organize a complete timeline, including specific tasks for your event. Make sure that those tasks are delegated to other members of your organization and that deadlines are attached.

12 Week prior to your event...
- Get Contracts (for paid artists/speakers/performers) or ASP Alert Forms (for free artists, speakers, or performers) to the Office of Student Leadership & Service (or other appropriate office – see the Contracts subsection of the Eagle Source). The ASP Alert Form requires officer signatures as well as the security estimate given to you by EPD. Along with a Contract you must bring a Contract Cover Sheet that has the same requirements as the ASP Alert Form and a clean copy of the contract.
- Invite your advisor to attend this event.
Request any departmental co-sponsorships necessary for your event to occur. In addition to money, what else can be contributed?

- Contact Campus Services (404-727-7468) for set up/clean up needs and any special furniture that you need. The organization is responsible for set-up, clean-up and any applicable fees.

- If applicable: Inquire with your venue regarding food guidelines (Must you use their service? Can you bring in outside food?) Make all necessary food arrangements.

- Develop a comprehensive marketing plan- how will people find out about your event? Besides LearnLink flyers, what can you to increase awareness about your event? When will each method of publicity be used?

**8 Weeks prior to your event…**

- Make sure you are still communicating regularly with your treasurer.

- Brainstorm ‘What if…” scenarios and make a plan for each. “What if the Artist cancels?” “What if it rains?” “What if fewer people than expected show up for the event?” “What if MORE people than expected show up?”

- The President’s Office should be informed of all high profile guests so that President Wagner may have the option to send a delegation to meet the Artist if they deem it necessary. Contact Ms. Marion Dearing (404.727.6013).

- Inform any academic departments that may be related to the subject matter of your event. **6 Weeks prior to your event…**

- Contact Lt. Finley of the Emory Police Department (404-727-8005) to remind them of the event. If necessary, you may also request security guards for the event.

- If you would like the event to involve alcohol, please review the section of this guide entitled “Purchasing Alcohol”. Submit your Event Registration form at this time to avoid a last minute rush.

  - Beware, alcohol increases the cost of your event, requires EmoryCard readers, security, and your advisor to be present when alcohol is served. Student organizations chartered under College Council are not permitted to serve alcohol at functions.

- Contact campus media outlets such as, The Emory Wheel, Emory Report, Office of University Media Relations, the Emory Events calendar, WMRE, and any other campus publications.

- If applicable: give contracts to the appropriate office (OMPS, OSLS, OSFL or Residence Life) at least 6 weeks in advance.

- Request funding from other student organizations. If you’ll need funding from College Council, submit your funding request bill. Funds requested from SGA must be requested at least 35 days in advance.

**4 Weeks prior to your event…**

- Submit check requests so that all bills & artists are paid on time.

- If you will have print publicity, t shirts or tickets, make sure it goes into production now so that it’s ready when you need it.

- Will you need special parking access or accommodations? If so, contact Parking Services at 404-727-7275.

- If applicable: Arrange ground transportation for your Artist(s)

**2-3 Weeks prior to your event…**

- Begin to publicize your event (LearnLink flyers, paper flyers, bulletin boards, table tents, banners, etc.) Try to use innovative means to inform people about your event.

- Order food from the campus dining at least 14 days in advance.

- If using tickets, review the DUC ticketing guidelines and the SGA guidelines for selling tickets.

- Confirm all plans for your event; review all tasks for the day of the event- make sure that those tasks are delegated!
Create a schedule of tasks for each day of the “week of” your event; make sure that specific responsibilities are delegated to members of your committee.

*After your event...*

- Send thank you notes to each department/organization that helped make the event possible. Be sure to include your advisor and members of your organization!
- Fill out a program evaluation once your event is over & make sure that it gets passed on to the appropriate person in your organization.
Internal Program Evaluation

This evaluation is designed to record important information about your event. It is important to fill out an evaluation after each program so that improvements and changes can be made constantly. In addition, it would be beneficial to your organization to keep evaluations of programs in a file so that future members and officers may refer to the evaluation as a resource for their planning.

Date of event: ________________  Title of Event: ____________________________________________

Rate the success of program:
☐ Very successful  ☐ Successful  ☐ Fair  ☐ Poor

Explain your success rating above (goals met/not met, problems, highlights, etc.): ____________________________________________

Brief Description of Event: ____________________________________________

People involved in planning: ____________________________________________

Audience reaction: ____________________________________________

Attendance at Event: ___________  Total Estimated budget: ___________  Actual Cost for Event: ___________

• Did you estimated budget differ from your actual budget? If so, why? (Be sure to attached budget worksheet) ____________________________________________

Did you have Co-Sponsors for the Event? If so, who? ____________________________________________

What type of publicity did you use for this event? What was successful? ____________________________________________

What vendors did you work with (Sodexo, sound companies, printers)? Would you work with them again? ____________________________________________

Recommendations (Would you do this event again? Why or why not?) ____________________________________________

Draw room set up:

__________________________
These funds are only available for events that are open and equally advertised to the entire University community and will be denied if it is for a private function. The funds can only be used for purchases from Emory Catering and cannot be used for alcohol purchases. You must submit this application at least three (3) weeks prior to your event or it will not be considered. Please provide detailed information for each question and submit your application by e-mail to lroge01@learnlink.emory.edu or in person at the Student Government Association office room 515E on the 5th floor of the DUC. If you have any questions please call (404) 727-6179.

Name of individual making request:________________________________________________________

Campus Address: ___________________________ Campus Phone:_____________________________

Organization sponsoring event: ________________________ Name of Event:______________________

Location of Event:__________________________ Event Date and Time:_________________

Please describe the event and include how many are expected to attend:

__________________________________________________________________________________

Emory’s vision is to create a destination university internationally recognized as an inquiry-driven, ethically engaged, and diverse community, whose members work collaboratively for positive transformation in the world through courageous leadership in teaching, research, scholarship, health care, and social action. For a more in depth description of the vision statement please visit https://www.admin.emory.edu/Vision/summary.html. Please describe how this event promotes Emory’s vision:

__________________________________________________________________________________

Requested amount:________________________ (is a $250 limit per group)

Date submitted:________________________ Requestor’s signature:__________________________

Do not write below this line

Received by: ____________________________ ☐ Approved ☐ Denied

Notes:__________________________________________________________________________

November 20, 2006
Student Organization Alcohol Permit & Event Registration

Before completing this form, please ensure you understand the Emory Alcohol Policy at http://policies.emory.edu/8.8.

Sponsor Organization: ______________________________________ Smartkey Number: ______________

Person in Charge: _______________________ Phone Number: ______________ Email: __________________

Organization Advisor: _____________________ Phone Number: ________________ Email: ________

Title of Event: ___________________________________ Event Location: ________________________________

Description of Event:_____________________________________________________ Estimated Attendance: ________

Event Date: _____________________________ Event Start Time: ________________ Event End Time: _____________

To ensure compliance with the Emory University Campus Life Alcohol Policy, please answer the following questions:

1. Who will be attending the event? (circle all that apply)
   - Open to the Public
   - For Invited Guests Only
   - Other ______________________

2. Specify amount in ounces and kind of alcohol beverage to be served: ______________________________
   NOTE: Kegs are not permitted in the DUC or Cox Hall. Only Beer and Wine allowed.
   NOTE: Appropriate portion guideline per person over 21: 2 - 4oz. of wine or 2 - 12oz. of Beer

3. Specify amount in ounces & type of NON alcoholic beverage to be served (i.e. Coke Products, Punch, Etc...):
   _________________________________________________________________________________________

4. Specify amount and type of food to be served: ____________________________________________

5. Will individuals under the age of 21 attend the event? ☐ Yes ☐ No
   NOTE: All student organizations are required to use Emory Card Readers ($50.00 charge) to verify age. The person(s)
   operating the card reader must be a current Emory faculty or staff member who has been trained to use the machines.
   You must contact the Emory Card Office to reserve the equipment at least 2 weeks in advance (404-727-0224).

6. Have you ordered wrist bands for individuals over the age of 21? ☐ Yes ☐ No Yet
   Wristbands are required. If “not yet”, estimated date of completion: _____________________________

7. Have certified security personnel or Emory Police been hired for the event? ☐ Yes ☐ No Yet
   Certified Security is required. If “not yet”, estimated date of completion: __________________________

8. Have professional, third party alcohol servers been hired for the event? ☐ Yes ☐ No Yet
   Professional Bartenders are required. If “not yet”, estimated date of completion: __________________________
   Name of company hired (for all student organizations): _____________________________________________
   NOTE: For events in Cox Hall, those must be Sodexho bartenders.

9. Monitor(s) check to see that only people with appropriate hand stamp/bracelet, enforces policy to ensure
   alcohol does not leave the designated event space, and remains on duty throughout the event. For student
organizations, the primary monitor is the advisor.

Will your advisor be present?  ☐ Yes  ☐ Not Sure
NOTE: Advisors are required to be present if alcohol is present. You must reschedule the event in order to accommodate your advisor, or you must hold the event without alcohol.

******************************

Appropriate Authorizations

EVENT ORGANIZER: Your signature indicates that you have read and understand the Alcohol Policy (http://policies.emory.edu/8.8) and, if the event is sponsored by a Student Organization, that you have met with your advisor to discuss this event and how alcohol will be used.

Signature: __________________________________________________ Date: _____________________________ 
Printed Name:  _____________________________________________________________________________________ 

******************************

***FACULTY/STAFF ADVISOR (For Student Organizations) :
Please explain the role you have had in the planning of this event and any concerns or questions you may have:

By signing this form, the faculty or staff advisor acknowledges that she or he:
• Has read and understand the Emory Alcohol Policy (http://policies.emory.edu/8.8)
• Has met with the student(s) planning this event
• Will ensure that the organization will follow the alcohol policy and the steps outlined on this form
• Will be present at the event, when alcohol is present and being served.

Signature: __________________________________________________ Date: _____________________________ 
Printed Name:  _____________________________________________________________________________________ 

******************************

OFFICE OF STUDENT LEADERSHIP & SERVICE (for all student organization events): Take to DUC Room 340E for approval
☐ APPROVED  ☐ NOT APPROVED - Rationale:
Director’s Signature: __________________________________________________ Date: _____________________________ 
Printed Name:  _____________________________________________________________________________________ Phone: ____________________ Email: ___________________

******************************

DUC/COX Staff Approval (for all events in DUC or Cox Hall): Take to DUC Room 220E for approval
☐ APPROVED  ☐ NOT APPROVED – Rationale:

Staff Signature: __________________________________________________ Date: _____________________________ 
Printed Name:  _____________________________________________________________________________________ Phone: ____________________ Email: ___________________

Please make 3 copies of the form. Submit the original to Meeting Services for keeping (DUC Room 220E). Submit one copy to the Office of Student Leadership & Service (DUC 340E). The final two copies are for the Person in Charge and the Organization Advisor.
FINANCIAL ACTION FORM FOR RELINES

Organization Name____________________________________Smartkey #____________
Name and Title of Person Representing________________________________________
PO Box #____________________________Phone #_____________________________
Date________________________________Total Amount________________________

To Smart Key# ___________________
From Smart Key # ___________________
Amount to Reline___________________

To Smart Key# ___________________
From Smart Key # ___________________
Amount to Reline___________________

Reason for Reline: _______________________________________________________________________________
_______________________________________________________________________________________________
_______________________________________________________________________________________________

Signature of Divisional Treasurer________________________________Date_________
Signature of SGA VP for Finance________________________________Date_________
Internal Transfer Form

Requesting Organization (providing the funding)

Smartkey Number to Debit

Administrator of Debiting Smartkey

Receiving Organization

Smartkey Number to Credit (receiving the funding)

Administrator of Receiving Smartkey

Amount of Transfer $______________________________

Organizational Treasurer’s Signature Date

Divisional Treasurer’s Signature Date

SGA Treasurer’s Signature Date

SGA Business Manager’s Signature Date

Reason For Transfer [Print Below]: Please be specific. If charges are to offset another organizational or departmental Smartkey, we will need financial data from their ledgers.

Date on Excel___________ Date on PS___________

Emory University Student Government Association
The Eagle Source: A Guide for Student Organizations

Page 91

Form
(W-9
Rev. October 2007)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give form to the requester. Do not send to the IRS.

Name (as shown on your income tax return)

Business name, if different from above

Check appropriate box:  □ Individual/ Sole proprietor  □ Corporation  □ Partnership  □ Other (see instructions) □ Exempt payee

Address (number, street, and apt. or suite no.)

City, state, and ZIP code

See Special instructions on page 2.

Requestor’s name and address (optional)

List account number(s) here (optional)

Part I  Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose name to enter.

Part II  Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and

2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and

3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here

Signature of U.S. person

Date

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),

2. Certify that you are not subject to backup withholding, or

3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners’ share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester’s form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

• An individual who is a U.S. citizen or U.S. resident alien,

• A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,

• An estate (other than a foreign estate), or

• A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners’ share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

• The U.S. owner of a disregarded entity and not the entity,
# SGA DEPOSIT SLIP

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Total Cash _________________

Prepared By

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PROCUREMENT & PAYMENT SERVICES

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1599 Clifton Road
404-727-5400