KELLEY SCHOOL OF BUSINESS

Undergraduate Student Organization Manual

A supplement to the Indiana University
Student Organization Handbook & Policies

2015-2016

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OVERVIEW

Student organizations are a critical component of the Kelley School's academic environment and educational programs, giving students valuable opportunities beyond the classroom to develop professional maturity, strengthen leadership skills, and network with faculty, alumni, and industry professionals. Participation in student organizations can enhance the learning and development that happens in the classroom, and provides students with opportunities to practice the values of Integrity, Accountability, Perseverance, Appreciation, and Engagement.

This manual is designed as a supplement to the *Student Life & Learning Student Organization Handbook*, available from Student Life & Learning online at: http://studentaffairs.indiana.edu/student-life-learning/student-organizations/handbook-policies.shtml. The intent of this manual is to help Kelley organizations understand and navigate the policies and procedures specific to the Kelley School, as well as certain University policies commonly encountered by Kelley organizations.

Support for Kelley student organizations is provided through the Undergraduate Program office. If you need assistance or have questions about this manual, please contact:

Jim Johnson, Assistant Director, Undergraduate Program

Ben Taylor, Assistant Director of Student Life

Lisa Klow, Administrative Secretary
Undergraduate Program (HH 2030)
(812) 856-7852 ksengage@indiana.edu

REGISTRATION

In an effort to better promote Kelley student organizations to current and prospective students, to improve service, to facilitate communication, and to standardize procedures, the Undergraduate Program facilitates a process through which organizations may annually register to become listed as Kelley organizations.

Requirements

Organizations seeking registration as "Kelley School of Business" organizations must meet the following requirements:

- The organization must qualify for registration with Student Life & Learning.
- The organization must be advised by a Kelley faculty or staff advisor. Additional advisors are permitted.
- The organization must have a direct connection to Kelley or be of particular interest to business students. Organization members are not required to be business majors.
- The organization must obtain the endorsement of the Undergraduate Student Organization Review Committee.
- The organization will participate in Kelley Student Government through representation by a designated delegate.

Organizations not meeting these requirements, or with broader campus appeal, may register with IU without being listed as a "Kelley School of Business Organization."

Benefits and Privileges

There are many benefits to becoming a registered Kelley student organization, including:

- Use of the "Kelley" name in organization name (see policy)
- Listing on the Undergraduate Program website with a link to the organization's website
- Ability to post organization's events on the Kelley Events Calendar, in the Kelley Connection E-Newsletter, on digital signage, and through Kelley social media
- Representation in the Kelley Student Government, including the ability to apply for funding if eligible

Benefits and Privileges, cont'd.

- Ability to submit requests for external funding through the Office of Development & Alumni Relations
- Access to Kelley School server space, web template, and technical support
- Invitations to participate in Kelley special events
- Undergraduate Career Services recognition

Process

Approval of Kelley School of Business Organizations, including name approval, is at the discretion of the Undergraduate Program. New organizations with missions that duplicate or closely resemble the mission of existing organizations may be denied the Kelley designation.

Registration is a two-step process. For initial registration of a new organization:

1. Submit a New Organization form to Student Life & Learning through https://beinvolved.indiana.edu. Guidelines for registration, a description of benefits, and instructions are listed in the *Student Life & Learning Student Organization Handbook*, available at https://studentaffairs.indiana.edu/student-life-learning/index.shtml.

2. Upon initial registration, the organization leaders must meet with the Undergraduate Student Organization Review Committee to obtain their endorsement as a Kelley School of Business organization.

   In deciding whether or not to endorse the forming group as a Kelley School of Business organization, the Committee may consider:
   - Is there sufficient student interest in the organization to sustain the club over time?
   - Does the organization duplicate the efforts or mission of other existing Kelley organizations?
   - Is a Kelley affiliation appropriate for the organization, or would it be more appropriate for the organization to register only with the campus?
   - Are there any legal, regulatory, or branding concerns resulting from the formation of the organization and its affiliation with Kelley, and have these been adequately addressed?

Process, cont'd.

For annual re-registration of an existing organization:

> The organization must submit a beINvolved re-registration form annually before the fall deadline. Student Life & Learning makes this form available each spring.
>
> Organizations missing the initial deadline may be reinstated if re-registration is completed within the academic year.

The campus beINvolved roster should be updated any time there is a change in the organization's leadership.

FACILITY USE

Room Reservations

Any campus student organization may reserve rooms in Hodge Hall for meetings and events. To reserve a room, organizations must first complete the Campus Event Registration Form (http://studentaffairs.indiana.edu/student-life-learning/space-reservations/index.shtml) and submit it to Student Life & Learning.

Once the event is approved by Student Life & Learning, the form will be directed to the appropriate office to complete the space reservation. Many reservable rooms in Hodge Hall and the Godfrey Center are scheduled by Kelley, although most classrooms are controlled by the Office of the Registrar.

When making reservations, please remember to include time for set-up, technology checks, and clean-up in your request. Since event space is in high demand, please cancel any reservations that will not be used.

All student organization events requiring food distribution are subject to approval by Student Life & Learning and the Department of Environmental Health and Safety (EHS). For events involving food, organizations may be required to submit a Temporary Food Service Application. Allow 10 days for approval. For more information consult the Student Life & Learning Space Reservation Policies, as well as the Temporary Event Food Service Program and related EHS policies.

Commercial activity (i.e., corporate advertising, solicitation) is prohibited in Kelley buildings and is restricted on campus by IU policy. The event registration process should help organizations avoid engaging in prohibited commercial activities.

For additional information about room reservations, commercial activity, or the Temporary Food Service Request Form, please consult the *Student Life & Learning Student Organization Handbook*.

Questions regarding confirmed room reservations in Kelley School buildings may be directed to ksbrmres@indiana.edu.

Table Reservations

Any campus student organization may reserve the counter on the first floor of Hodge Hall near rooms 109 & 111 for approved events such as recruiting, awareness, and fundraising activities (excluding pizza sales, which are no longer allowed). Standing reservation requests for no more than two days every week per semester will be permitted. To reserve the space, organizations must first complete the Campus Event Registration Form (http://studentaffairs.indiana.edu/student-life-learning/space-reservations/index.shtml) and submit it to Student Life & Learning. Commercial activity (i.e., corporate advertising, solicitation) is prohibited in Hodge Hall.

The following is a list of rules and regulations for use of Hodge Hall tabling space:

- Only one group will be approved to have use of the tabling area each day. No additional tables will be provided.
- Electrical cords cannot be used if they cross in front of classroom entrances. All electrical devices are subject to inspection. Items deemed unsafe will not be allowed.
- Classroom entrances must be kept clear of group equipment, such as chairs and carts.
- Groups are responsible for any noise complaints from the classrooms.

Once the necessary approvals are obtained, requests for specific table reservation dates are made through Facility Operations & Services, HH 141.

For more information, contact:

Marsha Marker, Senior Office Services Assistant
Facility Operations & Services (HH 141)
(812) 855-9470 foshelp@indiana.edu

EVENTS

Event Registration

Kelley student organizations may wish to initiate ambitious programs or events which involve multiple organizations or corporate partners. Such large or high profile events reflect on the School and its reputation. As such, the School has developed a registration process and guidelines for these events to help ensure adequate communication, appropriate support, and positive outcomes.

- Submission of the Kelley Organization Event Registration Form (http://tinyurl.com/KelleyEvent) is required for any programs or events organized or sponsored by registered Kelley Student Organizations which meet one or more of the following criteria:
    - Events involving corporate donors
    - Intended use of the Kelley name in event title
- The organization advisor must be aware of and approve the event.
- Events should be branded as student organization events (i.e., "The XYZ Club _____ Event"). Use of the word "Kelley" in the event name will not be allowed without specific authorization from the School and a genuine collaboration between the School and the organization(s) involved.
- The information submitted on the form will be reviewed and shared with other Kelley offices as needed. The Undergraduate Program will reply with a decision regarding event approval and event name approval (if applicable), as well as any recommendations related to event administration. Please submit the form early in the planning process to allow adequate time for review and communication.

Failure to Comply

Kelley student organizations failing to submit the Kelley Organization Event Registration Form prior to an event, failing to implement recommendations related to the event administration, or executing the event without Undergraduate Program approval may face consequences for non-compliance. Consequences may include, but are not limited to:

- Loss of eligibility to apply for Kelley Student Government funding
- Loss of access to corporate gift funds intended for the organization's use
- Loss of Kelley School of Business recognition and all related privileges (including the use of "Kelley" in the organization name)

Programs Involving Children

Student organizations often host or are involved in activities that include minors (i.e. individuals under age 18) such as prospective students or other children. If so, the organization and the individual participants are subject to specific requirements, reporting guidelines, and procedures as mandated by state law and IU policy. Program organizers are responsible for knowing these requirements and ensuring compliance.

Among other requirements, the activity must be registered via the Protect IU Portal. In addition, some or all adult volunteers (age 18 and older) must undergo background checks in order participate in the activity.

The Programs Involving Children (PIC) Policy is outlined in the *Student Life & Learning Student Organization Handbook* section entitled "Space Reservations." The *Handbook* also contains links to relevant websites, forms, and to the actual University PIC Policy at http://policies.iu.edu/policies/categories/administration-operations/public-safety-institutional-assurance/PS-01.shtml.

For additional assistance with Programs Involving Children, contact Student Life & Learning or:

Cody Evans, Security Operation Services (CG3000)
(812) 855-1528 willevan@indiana.edu

PUBLICITY

Bulletin Boards in Kelley

The posting of flyers on Kelley doors, walls, floors, pillars, and restroom stalls is prohibited. Signs posted in prohibited areas will be removed. Student organizations may promote membership or activities by posting information on any of the "open" bulletin boards in those Hodge Hall classrooms which have them (fewer than 12 rooms). The bulletin boards are available to all student groups, one posting per board, preferably no larger than 8.5" x 11."

Glass Cases

29 glass display cases are available on the first floor of Hodge Hall for student organization use. Student organizations may check out a case for one semester.

To access an assigned case, a key may be obtained from Facility Operations & Services in HH141. Glass cases assigned to student organizations should contain current, relevant information about the student organizations. Glass case dimensions are 22" x 28". Content will be monitored periodically. Organizations not utilizing their assigned case, or failing to maintain current information, may have their case reassigned to another organization.

To request a glass case, or to be put on the waiting list, contact:

Marsha Marker, Facility Operations & Services (HH 141)
(812) 855-9470 foshelp@indiana.edu

Chalking on the IU Campus

The campus policy on chalking can be found in the *Student Life & Learning Student Organization Handbook* online at http://studentaffairs.indiana.edu/student-life-learning/student-organizations/handbook-policies.shtml.

In accordance with campus policy, student organizations may chalk on concrete sidewalks, only in areas where the chalking can be washed away by rain. Areas where chalking is prohibited include covered entry areas, step faces, retaining walls, building walls, and benches. Waterproof and spray chalk are prohibited. Organizations using spray chalk, or chalking in prohibited areas may be charged by the University for clean-up costs.

Utilizing Kelley's Electronic Media

Student Organizations wishing to have their events or newsworthy announcements (awards, etc.) publicized through Kelley's electronic media channels should submit the form at http://gokelley.iu.edu/KelleyConnection. Students may complement the form submission with a PowerPoint slide, photo or logo (.jpg preferred) to be used in promoting events. Any such supplemental files should be mailed to ksengage@indiana.edu.

Please submit materials as early as possible. After receiving the submission, Kelley staff will disseminate the event information throughout the School and online, as appropriate. Kelley staff reserve the right to make edits in order to ensure readability and appropriateness of content.

Electronic Media options include:

Hodge Hall Digital Signage (LCD screens)

***Kelley Connection* E-Newsletter**
The newsletter is published on the first Monday of each month. To ensure inclusion, submit information at least one week prior to this date.

Undergraduate Program Events Calendar
Viewed at http://kelley.iu.edu/ugrad/, utilization of the events calendar allows internal and external audiences to get a sense of the many opportunities available at Kelley. Appropriate postings include call-out meetings, competitions, lectures, and programs open to the general student body. Closed events such as membership meetings and executive board meetings will not be posted.

Kelley Twitter feed (https://twitter.com/kelleyschool)

Kelley Facebook page (https://www.facebook.com/KelleySchool) – *only for major events with separate landing pages on kelley.iu.edu*

Kelley LinkedIn page (https://www.linkedin.com/edu/school?id=18341) – *only for events open to Kelley alumni*

Kelley Blog (http://kelleyundergrad.blogspot.com/)

Stanchions at Kelley

A limited number of 22" x 28" stanchions are available for student organization use. Stanchions may be used for posting directional signage on the day of an event. They cannot be used for promotional purposes. To reserve stanchions, contact:

Marsha Marker, Facility Operations & Services (HH 141)
(812) 855-9470 foshelp@indiana.edu

Kelley Living Learning Center Promotion

Student organizations may submit information about events which offer first-year students a special opportunity to add value to their college experience for possible inclusion in the weekly KLLC email. Space is limited and not all submissions will be published. To submit items for consideration, email KLLCLEAD@indiana.edu with a 50-60 word description by Noon Wednesday before the Friday publication. Student organizations interested in planning an educational or professional development program in collaboration with the KLLC may contact the associate director at KLLCLEAD@indiana.edu.

Display Cases

The Undergraduate Career Services Office has two display cases for exhibiting student and/or student organization achievements (e.g., case competition trophies, certificates, photos, Little 500 trophies). The cases are highly visible to recruiters visiting campus. All registered Kelley organizations are welcome to utilize the locked cases to display their achievements. The displays will be rotated based on the number of submissions received during the academic year.

To provide items for display with the UCSO, contact:

UCSO Student Services
Undergraduate Career Services (P101)
(812) 855-5317 ucso@indiana.edu

The Undergraduate Program Office also has a display case near HH 2030 for exhibiting case competition trophies or student organization awards. Kelley organization awards will be displayed as space permits.

To provide items for display by the Undergraduate Program, contact:

Student Life
Undergraduate Program (HH2030)
(812) 856-7852 ksengage@indiana.edu

IU NAME, LOGOS, AND WORDMARKS

Per IU Policy, "Student organizations may use Indiana University before the title or name of their group only if the organization receives money from the Committee for Fee Review, has been approved for listing on the Bursar's registration checklist, or upon approval by the Dean of Students." Most, if not all, organizations registered with Kelley would not qualify to use "Indiana University" or "IU" before their organizational name. You may, however, incorporate the phrase "at Indiana University" below your organizational name or elsewhere on print or electronic media.

Registered Kelley student organizations must also adhere to Indiana University's branding guidelines: http://brand.iu.edu/

Block IU and IU Wordmark

Student organizations may not create their own logos that incorporate the trademarked block IU. Any text adjoined to a block IU is considered to be a wordmark or signature; only IU Communications may create an official signature at the request of an academic or administrative unit.

Broad restrictions have also been placed on the general use of the block IU on websites, in print, and on apparel. Organizations must follow usage requirements carefully.

You may use the IU wordmark in the form of an "IU web branding bar" or Branding Header on your website (see http://brand.iu.edu/downloads and this manual's section on Web Presence).

Printing Trademarked Symbols

To have the block IU, IU wordmark, or any other trademarked university symbol printed, you must get approval from IU's Office of Licensing and Trademarks (logo@indiana.edu) and use an approved vendor. A current list of vendors is available at http://www.indiana.edu/~purchase/contract/Promotional/promotional.php.

Approved vendors regularly work with Licensing and Trademarks to make sure their printed products are in compliance.

KELLEY NAME, BRAND AND MARKS

Kelley Name and Brand

Use of the Kelley name is a privilege, and all student organizations are expected to maintain the strong integrity of that name. The key attributes reflected in the Kelley name are outlined in the school's mission statement and honor code.

As a top-ranked school, Kelley has a vested interest in protecting its brand and ensuring the School is represented responsibly and fairly. Kelley values the superb work of student organizations and supports all groups in their endeavors to succeed. Faculty and staff do, however, expect students to adhere to guidelines and policies set forth by both Indiana University and the Kelley School of Business to guarantee the great reputation of both institutions is sustained.

Organizations should, at all times, strive to positively represent and promote the Kelley name. Any vulgar, obscene, or offensive representations of the Kelley name may, at the discretion of the Undergraduate Program, lead to sanctions. This might include, depending on the severity of the offense, prohibited use of the Kelley name, restrictions on attending special events, and a freeze on access to advertising/promotional outlets within Kelley.

Student Organization Names

In alignment with university-wide guidelines surrounding the use of Indiana University in student organization names, the Kelley School requires that all student groups who choose to use the Kelley School name clearly indicate in their organization title and constitution that they are "at Kelley" or "at the Kelley School of Business." Student organizations may not use "Kelley" or "Kelley School of Business" before the name of their group. The purpose of this distinction is to ensure that outside individuals or organizations which interact with student organizations are aware that their dealings are with the club or group and not with the School itself.

The approved exceptions to this policy are for Kelley Student Government, an organization affiliated with the Undergraduate Program Office and which includes representation from all other Kelley School of Business Organizations, and Kelley Outfitters which is affiliated with the Dean's Office.

Using Kelley on Print and Electronic Publications

Any print or electronic publications produced by a student organization at the Kelley School of Business should clearly indicate that they are produced by the student organization, not the School, and should also include one of the following disclaimers:

"The views and opinions expressed in this publication are those of the authors. These views and opinions do not necessarily represent those of the students, faculty, or staff at the Kelley School of Business."

"The views and opinions expressed in this publication are intended to encourage debate and discussion. These views and opinions do not necessarily represent those of the students, faculty, or staff at the Kelley School of Business."

Using Kelley on Student Organization Web Pages

Kelley student organization web pages, whether hosted through Kelley servers or elsewhere, should include the following statement on their homepage:

"The content, opinions and links displayed on this student organization web page do not necessarily reflect a position or policy of the Kelley School of Business or its affiliates. The Kelley School does not endorse or assume responsibility for content on student organization web pages."

Those groups using "Kelley" in their student organization name and which host websites on non-Kelley servers must indicate their affiliation with the Kelley School of Business on their homepage. Failure to adhere to this policy will result in loss of the use of "Kelley" in the organization's name.

For further information, see the section on Web Presence, below.

Using Kelley for Student Organization Events

Events should be branded as student organization events (i.e., "The XYZ Club _____ Event"). Use of the word "Kelley" in the event name will not be allowed without specific authorization from the School and a genuine collaboration between the School and the organization(s) involved.

For additional information about student organization events, including registration requirements and processes, see the section on Events, above.

Kelley Signature, Wordmark and Mark

Student organizations **may not use** the Kelley wordmark or signature in any form or on any media (electronic or print). There are no exceptions to this policy. Per university guidelines, wordmarks and signatures can only be used by academic units.

The Kelley signature is printed here. The wordmark is essentially the signature without "Indiana University."

Kelley Student Organizations may not use the Kelley Mark without specific approval from the Kelley Office of Marketing and Communications. The Mark is printed below.

For more information, contact:

Inga Paegle, Associate Director of Marketing (CG 3110J)
(812) 855-9620 ipaegle@indiana.edu

WEB PRESENCE

Rather than developing a unique, stand-alone website, organizations seeking a web presence may wish to consider fully utilizing the beINvolved system to meet website needs. beINvolved can accommodate general information, contact information, an events calendar, news items, pictures, video, roster management, and document archiving. Options for developing a website specific to your organization are discussed below.

Hosting Site on IU or Kelley Server

If your organization is open to non-Kelley students at IU, you may consider requesting space on the Webserve IU server (indiana.edu) as outlined in the *Student Life & Learning Student Organization Handbook*. This request process involves securing letters from the organization advisor and his or her supervisor (chair). Additional information is available online at http://kb.iu.edu/data/abtv.html and http://webmaster.iu.edu/index.phtml. Tools for building a website are available at https://wcms.iu.edu/.

Alternately, registered Kelley Student Organizations can request site hosting space on the School's server (kelley.iu.edu). There are two options for websites hosted on Kelley servers: *Hosting Only*, and *Template + Hosting*. Organizations choosing the *Hosting Only* option receive no web development support, but will be given access to a virtual web folder for the organization. Historically, very few clubs have successfully utilized this option. The *Template + Hosting* option is described in further detail below.

To request space on the Kelley server, have your advisor contact the Office of Marketing and Communications – Digital Media Team.

Kelley Website Template for Organizations

A standardized, branded website template has been developed for use by student organizations with sites hosted on Kelley servers. This is the recommended option for Kelley student organizations. By utilizing this template, your organization will adhere to both IU's visual identity guidelines and Kelley's branding standards. Websites using the template are fully supported by Kelley's Marketing and Communications office for development, updates, and maintenance. An in-person consultation is required before the template will be set up for your site.

Kelley Website Template, cont'd.

The student organization template has a standard, Kelley-specific palette, so individual groups should establish their distinct visual identity through the use of photographs/illustrations and original copy/text. See the Kelley Student Government website (http://kelley.iu.edu/ksg) as an example.

To request the template, or to request any changes to websites using the template, have your advisor contact the Office of Marketing and Communications – Digital Media Team.

Kelley Name on Your Website

If you are a registered Kelley organization but opt to not utilize the aforementioned website template, you should nevertheless clearly indicate your affiliation with Indiana University and the Kelley School of Business on your site. This can be done through introductory text on your homepage or in an "About Us" or other appropriate section of your site.

While the Undergraduate Program does not prohibit groups from hosting sites on a non-IU or non-Kelley server, groups whose names include "Kelley" must indicate their affiliation with the Kelley School of Business on their homepage. Failure to adhere to this policy will result in loss of the use of "Kelley" in the organization's name.

IU Web Branding Bar and Favicon

Organizations are encouraged to incorporate the official crimson IU branding header (branding bar) and IU favicon on their websites, as long as the sites are hosted on IU or Kelley servers. These trademarked items are built into the Kelley student organization website template. Sites published on IU's Webserve include the IU favicon automatically.

To add the bar to your existing website, see http://brand.iu.edu/downloads.

Additional Questions

Additional questions about Kelley Student Organization websites may be directed to ugradweb@indiana.edu.

CAREER PROGRAMMING AND THE UCSO

The Undergraduate Career Services Office (UCSO) organizes career-related workshops each year that are scheduled to align with the recruiting calendar. Due to limited bandwidth during the fall and spring recruiting seasons, the UCSO cannot provide support to individual organization program requests. However, the UCSO encourages organizations to partner with them on key events and workshops such as career fairs, discussion panels, resume review, interview preparation, etc.

What do organizations gain by co-sponsoring workshops with the UCSO?

- Build a positive relationship with the UCSO
- Receive club recognition on UCSO marketing materials to highlight the partnership
- Educate members on various career-related topics
- Avoid duplicating events that the UCSO already provides

What's in it for the UCSO to partner with an organization?

- Build strong relationships with Kelley student organizations
- Increase student attendance at UCSO events
- Increase student career awareness and engagement

What does a co-sponsorship role involve?

- Plan ahead and ask UCSO to partner in advance
- Promote the event to ensure organization members and other students will attend
- Provide feedback of the event to help UCSO continually improve.
- Possibly participate in an event as a panelist or co-presenter (if applicable)

When considering partnerships with Kelley organizations, the UCSO staff takes into account each organization's track record, long-term sustainability of membership, and ability to reach a critical mass of students.

If your club is interested in co-sponsoring a UCSO event, please contact:

Beth Barnhart, Associate Director of Engagement
Undergraduate Career Services (P101)
(812) 855-5317 bhbarnha@indiana.edu

Corporate Gifts

Many Kelley student organizations are successful in securing corporate support for their organizations and for their events. The Office of Development, Corporate & Foundation Relations, is a liaison between Kelley's corporate partners and Kelley's undergraduate students. Listed below are guidelines to help facilitate gift solicitation, stewardship and utilization of gift funds.

Solicitation

All efforts to solicit external funding from corporate donors must be coordinated with the Office of Development, Corporate & Foundation Relations, CG 3080, including corporate support for case competitions (see also Case Competitions, pp. 32-33).

When organizations work with Development, Kelley, as a whole, is able to be more professional in its approach to solicitation and it ensures:

- Corporate donors receive proper gift credit and maximum tax benefits (gifts must be made to the IU Foundation through Development).
- Development can help student organizations identify potential donors, improve their solicitation materials, and provide accurate information to donors about submitting gift funds.
- Collaboration allows the Development staff to be better informed of student organization activities and needs, and creates the potential to incorporate those needs into larger gift requests that Kelley may be developing.

Ways Kelley organizations may work with Development:

1. Submit requests annually to the *Corporate Opportunity Guide*.
   - Each fall, the Office of Development publishes a booklet of giving opportunities to share with campus recruiters and prospective donors. The electronic guide is available at http://www.kelley.iu.edu/development/cf_opportunity_guide.cfm. The form for submitting requests is available on the same page and should be submitted by April 30 for inclusion in the fall publication.

Corporate Gifts, cont'd.

- Submissions should outline your organization needs, as well as any benefits to the donor(s). Typically, corporate donors seek to gain access to good students, and to build their brand among the students. Opportunities to accomplish these goals will appeal to potential donors.
- Submissions to the *Corporate Opportunity Guide* should request support for a specific event, not general operational funds or money to purchase club shirts, etc.
- Submission of a request does not guarantee funding. However, the document does provide the Development staff with information about your organization and activities, allowing them to more effectively present your needs to potential donors and respond to donor inquiries.

2. Contact Development to share specific details for needs not listed in the *Corporate Opportunity Guide*.
3. Share with Development lists of companies and contacts your organization would like to approach. They may have a better contact within a particular company, suggestions for other companies with similar interests, or pre-existing plans to solicit those companies for larger gifts to Kelley.
4. Submit any planned solicitation materials, documents, or "pitch books" to Sonya Dunigan in the Office of Development for approval prior to disseminating such materials to potential donors. Development will review documents for proper Kelley brand representation and consistency of message.

Process:

- Office of Development may solicit funds on the student organization's behalf based on *Corporate Opportunity Guide* submissions.
- Student Organization must inform the Office of Development of any promised gifts or commitments made directly with a company.
- Office of Development will submit a payment request to the company.
- Funds received by Office of Development will be deposited into an Undergraduate Program IU Foundation account.
- Office of Development will notify the student organization, via email, of support received.

Corporate Gifts, cont'd.

If a company contacts your student organization directly, inform the Office of Development of any arrangements made with the company. This will allow the Office of Development to ensure there are no conflicts, prepare a corporate payment request to send to the donor company, and prepare and send the tax form when the gift arrives.

For assistance with corporate solicitation, contact:

Sonya Dunigan, Assistant Director of Development
Corporate & Foundation Relations (CG 3080)
(812) 856-0189 skduniga@indiana.edu

Stewardship

When a corporation sponsors an organization and its activities, the student organization is responsible for stewardship of their corporate gifts. This means to thank the donor company, include them in any sponsored activity, and let them know that corporate funds are being used according to their wishes.

Proper stewardship of gifts requires utilizing the gift for the intended purpose and within the intended time frame, typically within the same academic year. In addition:

- Send a thank you letter to the donor company. If the company is sponsoring a particular event, an invitation should be extended to them to participate. If they have provided general support, please send a schedule of your organization's events and let the donor know of the various activities they are welcome to attend.
- Recognize your corporate sponsors, including corporate logos, on your student organization website and publicly thank them during any event which they sponsor.

Corporate Gifts, cont'd.

Utilization

To ensure proper gift credit for the donor, gifts to Kelley in support of student organization activities and events must be deposited into the Undergraduate Program IU Foundation account. Student organizations receiving corporate gift support will be notified by the Office of Development and/or the Undergraduate Program.

Utilization of gift funds in the Undergraduate Program account requires advance planning and coordination with the Undergraduate Program staff. Each situation is unique, and several steps or processes may be required to utilize any one gift. Contact the Undergraduate Program at least two weeks prior to any planned use of gift funds. If corporate donors will be involved in a student organization event, the student organization must also submit the Organization Event Registration Form (http://tinyurl.com/KelleyEvent) as described earlier in this Manual.

The Kelley School reserves the right to redirect corporate gifts originally designated for student events to alternate student events or organizations, if the gifts are not utilized within the intended time frame for use of the gift. Student organizations not utilizing their corporate gift funds within two years risk losing access to those funds.

The primary methods of utilizing gift funds include:

1. Units of Indiana University (IMU, RPS, Document Services) may be able to bill the Undergraduate Program directly, or external vendors may be able to submit invoices directly to the Undergraduate Program for payment. Contact the Undergraduate Program at least two weeks in advance to ensure proper procedures are followed.

2. In some cases, individuals may be reimbursed by the IU Foundation for expenses paid in support of the event or activity funded by the gift. Receipts, listing only items to be reimbursed, must be submitted to the Undergraduate Program office within 60 days. Contact the Undergraduate Program in advance to ensure that expenses are reimbursable, as restrictions apply: for example, gift cards, alcohol, and non-Coke beverage products are not reimbursable. Reimbursements submitted after 60 days are considered taxable payments by the IRS.

Corporate Gifts, cont'd.

3. If other procedures are not feasible, gift funds may be transferred to the organization's Student Organization Account (SOA) to reimburse the organization for approved expenses. This is the least-preferred option for utilizing gift funds, although SOA purchases may be appropriate considering they are tax-exempt.

4. If travel is involved, the organization must follow the travel guidelines outlined later in this manual.

To arrange the proper use of gift funds, allow at least two weeks advance notice and contact:

Jim Johnson, Assistant Director
Undergraduate Program (HH 2030)
(812) 856-7852 ksengage@indiana.edu

Purchasing Procedures and Approved Vendors

Student organizations purchasing food, apparel, or other items using corporate gift funds or University funds must follow University and IU Foundation purchasing procedures, including the use of licensed, approved, and/or preferred vendors when required. Students should work directly with a Kelley staff member at least two weeks in advance to arrange any such purchases.

Catering

To utilize corporate gift funds for catering purchases, the vendor must have a W9 on file and be willing to invoice Indiana University Kelley School of Business for payment. There is no readily available or definitive list of approved catering vendors, but reliable food vendors are:

Aver's Pizza	Honey Baked Ham	Pita Pit
Bloomington Bagel Co.	Fazoli's	Pizza X
Bucceto's	McAlister's Deli	Roly Poly
Chick-fil-a	Mother Bear's	Which Wich

Promotional Items or other purchases

To utilize corporate gift funds for any purchase, the vendor used must have a W9 on file and be willing to invoice Indiana University Kelley School of Business for payment. There is no readily available list of all approved vendors for apparel or other products; however, "preferred" vendors should be used whenever possible.

Apparel or other promotional items which contain trademarked IU logos can only be purchased from vendors licensed to produce IU merchandise. The "preferred" promotional item vendors are all licensed. A list of preferred apparel/promotional item vendors is available at http://www.indiana.edu/~purchase/contract/Promotional/promotional.php and preferred vendors for other products can also be found through the Office of Procurement Services website.

For assistance with these purchasing processes, contact the support staff member responsible for purchasing within the appropriate department at least two weeks in advance, or contact:

Sarah Lewis, Financial Assistance Support Team (CG 3037)
(812) 855-5038 silewis@iu.edu

Kelley Student Government Funding

Registered Kelley student organizations are represented in Kelley Student Government (KSG). Responsibilities and expectations of KSG membership are outlined in the KSG Constitution (http://kelley.iu.edu/ksg). One privilege of membership is the ability to apply for funding through KSG.

The Kelley School provides funding each year for use by student organizations to support programming and events that benefit students or the School. The process for disbursing this support has been delegated to the KSG, using the following procedures:

- Student organization leadership must attend the Kelley Club Kickoff early in the fall semester for the organization to be eligible.
- Organization must have an active KSG delegate who meets the attendance requirements outlined in the Constitution.
- Organization requesting support must have a Student Organization Account (SOA) into which the funds can be transferred. Information about Student Organization Accounts can be found at http://soa.indiana.edu/.
- Each eligible organization may request funding once each semester.
- Organization must submit the Application and Budget Form which are available on the KSG website.
- KSG Funding Committee will review application. The committee may:
    a) Determine that the application does not meet the Kelley School's funding goals and priorities,
    b) Approve funding for amounts under $300, or
    c) Invite the organization to present the funding request to the entire KSG for approval.
- The KSG advisor may facilitate the funding request presentations and voting during KSG meetings.
- Student organization funding requests may be supported until available funding is exhausted. Unutilized funds will not carry forward to the following academic/fiscal year.

Other Funding Sources

Student organizations may seek financial support from sources other than corporate gifts and Kelley Student Government.

Two of the primary campus funding sources are:

IUSA Student Organization Funding Board (IUSA Aid)

- The Indiana University Student Association Funding Board meets weekly, at which time requests are presented, reviewed, and voted upon by the board.
- Any registered student organization that wishes to be eligible for funding from IUSA Aid must have attended an orientation session with Student Life & Learning. For information on make-up orientation sessions, please email iusll@indiana.edu.
- For guidelines, application procedures, or more information consult the IUSA website or contact iusaaid@indiana.edu.

Indiana Student Foundation Metz Grant

- Funding for the Metz Grant Program comes from the Arthur R. Metz Philanthropic Opportunity Fund and is administered through the IUSF Scholarships and Service Committee. The Metz Grant Program will annually award $50,000 in grant money; $25,000 in the fall and $25,000 in the spring.
- Applicants must demonstrate a need for financial support for a philanthropic cause.
- Additional information, application materials, and deadlines are available at http://iusf.indiana.edu/get-involved/students/scholarships-grants.shtml

A more comprehensive list of funding sources can be found at http://studentaffairs.indiana.edu/student-life-learning/student-organizations/funding.shtml.

Student Organization Accounts (SOA)

Most registered student organizations at IU are eligible to open monetary accounts through the Student Organization Accounts office. Organizations utilizing SOA may not have off-campus bank accounts; organizations needing financial services must choose to utilize either SOA or a bank.

Eligible organizations may establish a Student Organization Account by completing the Financial Account Request Form available on the SOA website, http://soa.indiana.edu/forms.php.

The SOA purchase card may be used to make tax-exempt purchases with local merchants up to the maximum $500.00 limit. Otherwise, student organizations may not make tax exempt purchases utilizing the University's tax exemption certificate.

Additional information about Student Organization Accounts can be found in the Student Organizations Handbook and on the SOA website, http://soa.indiana.edu/.

Raffles, Charity Gaming Events, Drawings, and Prizes

Student organizations may wish to raise funds through a raffle, casino night, door prizes, or other gaming events. Such activities are prohibited on campus. Organizations may organize casino or poker nights for social purposes only, provided there is no exchange of money including prizes, buy-in, entry fees, or donations required as a condition of participation.

Only organizations classified as tax-exempt under section 501 of the Internal Revenue Code, and which have been in existence for five years or more, are eligible to conduct a legal gaming event in Indiana. Gaming events are regulated by the State and require a gaming license or exemption, as well as post-event reporting. Indiana University does not have a gaming license, and most student organizations would not qualify for one.

Registered student organizations holding events on university property are required to follow the Indiana University policy on Drawings, Games, and Prizes, which prohibits raffles. Prizes associated with drawings or other allowable games of chance are considered taxable income and are subject to certain reporting requirements.

For additional information, consult the Drawings, Games, and Prizes policy available at http://policies.iu.edu/policies/categories/financial/index.shtml.

Undergraduate Student Organization Scholarship Awards

At the direction of the Dean, all scholarship funds awarded through Kelley must be processed by the Undergraduate Program Scholarship Manager. Below are the proper procedures through which an undergraduate scholarship, designated for a student organization, is to be awarded and the roles of each staff/faculty member and student leader involved. Any scholarships awarded or promised outside the parameters of this procedure, or without the involvement of the Scholarship Manager, will not be funded by the School or processed through the University.

Roles of involved parties:

- Office of Development and Alumni Relations – Development is charged with bringing the funds into the University. Development will serve as the contact to the donors and will ensure that donor intent is honored when awards are made. Development will notify the Scholarship Manager as well as the student organization when funding is received so both parties are aware that an award will need to be made.
- Undergraduate Program Scholarship Manager – The Scholarship Manager will know of the establishment of the award and will be the holder of the criteria for the award. The Scholarship Manager is ultimately responsible for the award being made, keeping donor intent in mind. The Scholarship Manager also processes and tracks all scholarship awards, ensuring that the students receive the scholarship funds. She will notify donors and other constituents of the recipients.
- Student Organization Representative – The student representative will be the liaison between the Scholarship Manager and the student organization. The student will serve as an information resource for the Scholarship Manager, providing information such as the student organization roster and any other information the Scholarship Manager requires to properly make the award, promoting awareness of the opportunity and application process, and encouraging members to apply.
- Faculty Advisor to the Student Organization – The Faculty Advisor will serve as a 'back-up' resource to the student representative. If the Scholarship Manager has difficulty in securing information from the student representative, the Faculty Advisor will provide needed information to the Scholarship Manager. The Faculty Advisor also

Organization Scholarship Awards, cont'd.

provides continuity and education for the organization, offering a historical perspective about the awards and ensuring that the student representative is aware of and following scholarship procedures.

Process for awarding Student Organization Awards:

- Funding is received in Office of Development.
- Office of Development notifies the Scholarship Manager and student representative that funding is received and provides the criteria established by the donor to Scholarship Manager.
- Scholarship Manager contacts the student representative to request the information required to make the award. When appropriate, the Scholarship Manager may work with the organization and/or Faculty Advisor to establish the club's role and involvement in the application or selection process.
- Scholarship Manager makes the award at time period indicated on criteria form (i.e., Fall/Spring).
- Scholarship Manager notifies the recipient that they have received a scholarship, and also notifies the Faculty Advisor, donor, and Office of Development.

The organization (including officers and/or the Faculty Advisor) should not select award recipients or promise funding to members unless specifically asked to do so by the Manager of Scholarships. Such financial obligations, if made, are solely the responsibility of the organization and will not be honored by the Kelley School.

Donations secured outside of this process will not be awarded as scholarships through Indiana University, the IU Foundation, or Kelley systems. Cash awards of this type must be arranged directly between the organization, the donor, and the recipient utilizing the organization's Student Organization Account (SOA).

Failure to follow these guidelines nullifies the donor's gift tax credit and donor recognition, both of which are almost always very important to them.

If a donor does not want to receive tax credit and gift recognition (this may the case for very small gifts), Kelley Development staff will work with the student organization to determine whether the gift should be processed as a Kelley Undergraduate Scholarship or paid via the group's SOA.

Organization Scholarship Awards, cont'd.

For more information or questions about this policy, contact:

Sonya Dunigan, Assistant Director of Development
Corporate & Foundation Relations (CG 3080)
(812) 856-0189 skduniga@indiana.edu

Or

Missty Warren, Scholarship Manager
Undergraduate Program (HH 2030)
(812) 856-7852 buscholr@indiana.edu

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CASE COMPETITIONS

There are an ever-increasing number of case competitions within the Kelley School, many of them organized and sponsored by student organizations. Any case competition funding solicited from corporate donors must involve coordination with the Office of Development and Alumni Relations, as outlined in the Corporate Gifts section of this manual. Operational or prize funds received from a corporate donor must be deposited with the IU Foundation or Indiana University.

Beginning in 2012, all competition awards that can be classified as part of an Indiana University student's academic experience must be processed through the Student Information System (SIS) and disbursed through the student's bursar account. Such awards will count against a student's financial aid package, meaning that grant funding or student loan eligibility may be reduced as a result of the award. To help avoid potential aid conflicts, case competition organizers may work with Missty Warren, Scholarship Manager, to pre-screen the financial aid eligibility of any undergraduate, Kelley-admitted competition participants. To utilize this option, contact Mrs. Warren at buscholr@indiana.edu at least one week prior to the case competition or award selection.

Non-IU student competition awards will be processed on a Disbursement Voucher for payment by check.

Students cannot receive prize funds until after the required forms are received and all steps below have been completed.

The steps for facilitating payment of case competition prize funds are:

1. As soon as the student organization is aware that it will be hosting a competition, the leadership should notify the Business Office so that any needed accounts, sub-accounts, or SIS item types can be established by the University. This process can take up to six weeks.

2. Once the competition has taken place, the student organization advisor (or another faculty or staff member affiliated with the competition) must complete the *Request for Competition Award Disbursement* form at http://www.kelley.iu.edu/Business/Miscellaneous/competitions/page20902.html and submit it to Janelle Anderson in the Business Office, CG 3023. Students should not collect this information as it is sensitive data which must be kept securely until it is submitted to the Business Office. *This form should not be sent through e-mail.*

3. For any Non-IU recipients, the advisor will also need to collect and submit tax forms and provide a copy of a notification letter for each recipient. Additional information and links to the appropriate forms are included on the *Request for Competition Award Disbursement* form.

4. If the prize funds are provided through a corporate gift, awards will not be processed until funding has been received and deposited by the Office of Development and Alumni Relations.

Once the steps above are completed, Janelle Anderson will begin processing payment of the awards. The process involves multiple steps and may take two-three weeks. Ms. Anderson may be able to answer questions about the timing of fund disbursement, although she has no control over the process itself.

Questions about this process should be directed to:

Janelle Anderson, Accounting Representative
Business Office (CG 3023)
(812) 855-9071 jrander3@indiana.edu

Or

Kim Crider, Business Manager
Business Office (CG 3023)
(812) 855-2789 kcrider@indiana.edu

Liability

The University does not provide liability coverage for student travel. All students traveling as representatives of the Kelley School must sign an "Assumption of Risk and Release from Liability" form, regardless of who pays for the trip. Students must complete and sign a separate form for each trip taken. The form must be completed at the time travel arrangements are made, submitted prior to departure, and retained within the department or program office sponsoring the organization or arranging the travel for a period of two years. Students not completing the form may not travel.

The Liability Release Form can be found under Travel, on the Business Office website at: http://www.kelley.iu.edu/Business/Travel/page4778.html.

Reimbursements for Travel

Any student traveler expecting to be reimbursed for travel expenses or personal vehicle mileage using corporate gift funds or University funds must have an IU Travel Authorization and IU Trip ID in place prior to travel. These students must work with the staff member responsible for travel within the appropriate department to establish authorization in advance and to process reimbursement following the trip.

Authorization involves multiple steps. First, the staff member will add the student as a traveler in the IU Travel system. This generates an item in the student's One.IU Action List which requires the student's approval. Once approved, the staff member can generate the trip authorization needed to make any advance travel arrangements and/or process reimbursements. Finally, the student may be asked to sign up for Direct.

To be reimbursed, travelers must submit receipts for all reimbursable expenses such as hotel room, parking, tolls, airfare, and baggage fees. Mileage is paid at a flat rate to drivers of personal vehicles, so fuel receipts are not needed. Meals are covered by a per diem, so food receipts are typically not needed.

IU Travel will only reimburse an authorized traveler, and only for his or her own expenses. Travelers cannot be reimbursed for other traveler's airfare, meals, or other expenses, except for shared hotel rooms which may be billed to one traveler.

Pre-paid Travel

Student organizations using corporate gift funds or other University funds for student travel may be able to arrange prepayment of some expenses, thereby avoiding some need for using personal funds and requesting reimbursement after the trip. Airfare, hotel rooms, vehicle rental, and conference fees are examples of expenses which may be paid in advance or billed directly to a department, depending on the specific situation. In order to arrange pre-payment, each traveler must have a travel authorization in place as described in the section above.

Transportation

Driver Approval

Any driver traveling on University business must be approved annually by the Office of Insurance, Loss Control & Claims, whether they plan to drive a University vehicle, rental vehicle, or personal vehicle. Only individuals age 21 and over may be approved to drive on University business. To be approved, each driver must fill out the Authorization Form for Motor Vehicle Records Check available through the INLOCC website (http://inlocc.webhost.iu.edu/index.cfm#) under Functional Areas > Loss Control > MVR.

Use of Personal Vehicle

Students age 21 and over may use personal vehicles for student organization travel provided all applicable policies regarding student travel and vehicle use are followed. If trip expenses are being covered by gift funds or a University department, mileage will be reimbursed to the driver provided a travel authorization is in place prior to the trip. The same authorized driver may also be reimbursed for parking and tolls if receipts are provided.

When a personal vehicle is being used on University business, the University provides no insurance coverage for damage to the vehicle.

Motor Pool/Vehicle rental

Students age 21 and over who are members of a recognized student group may use a University vehicle for approved travel. (See “Operation of University Vehicles” in the Policies section of the INLOCC website (http://inlocc.webhost.iu.edu/index.cfm#.)

Transportation, cont'd.

When using any vehicle on University business, groups of six or more students must be accompanied by an Approved University Employee or other approved chaperone. A student group requiring more than four vehicles for a trip must arrange for alternative means of transportation OR apply for an exemption of this rule from the Motor Pool and the Office of Insurance, Loss Control & Claims. (See "Who Can Use University Vehicles" in the Policies section of the INLOCC website (http://inlocc.webhost.iu.edu/index.cfm#.)

IU does not allow the use of 12- or 15-passenger vans.

Vehicle reservations may be made through the Travel Management website at: http://www.indiana.edu/~travel/. Select the Motor Pool Rental link or the Enterprise Campus Rental link. Vehicle rentals may be charged to SOA or to a campus department.

For additional information about vehicle rental, contact Student Life & Learning; Insurance, Loss Control & Claims; or Travel Management Services.

Vehicle charter

Student organizations chartering buses using their own funds (i.e. SOA) may arrange the charter through any means acceptable to the Student Organization Accounts office and/or the vendor (e.g., GO Express).

Student organizations chartering buses using corporate gift funds or other University funds must follow University travel guidelines and purchasing procedures. Indiana University cannot reimburse individual students or employees for payments to third parties for a service such as vehicle charter; a Purchase Order is required.

A Purchase Order must be established prior to the date of service, based on a written quote, estimate, or contract provided by the vendor. Please submit the quote or contract and the request for a PO to the appropriate department or IU staff member at least 10 business days in advance to allow processing time. Requests submitted are not guaranteed approval.

Transportation, cont'd.

Students or student organization advisors may not sign contracts. All contracts committing University funds, including contracts for transportation, must be reviewed and signed by the Indiana University Purchasing Department. Purchasing will return a signed copy of the contract to the vendor with the Purchase Order approval. When the vendor submits the invoice, purchasing will issue payment from the account listed on the purchase order.

For assistance with these processes, contact the support staff member responsible for travel within the appropriate department, or contact:

> Sarah Lewis, Accounting and Financial Support Specialist
> Financial Assistance Support Team (CG 3037)
> (812) 855-5038 silewis@iu.edu

Travel Overseas

All activities involving IU students studying or traveling abroad, including trips organized by student organizations, must be approved by the Overseas Study Advisory Council (OSAC). Proposals are reviewed as they are received. Applicants are advised to do advance planning in order to allow sufficient time to complete all necessary arrangements both at IU and abroad.

Please refer to the Overseas Study website to review the guidelines: http://www.indiana.edu/~overseas/policies/develop/proposal.shtml.