The College of Engineering

Student Leadership Center

Student Organization Handbook

Learn how to:

- Effectively lead a student organization at the University of Wisconsin—Madison
- Plan and host a successful event on campus
- Identify potential funding for your organization
- And more!
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STUDENT ORGANIZATION REGISTRATION REQUIREMENTS

In order to be considered a registered student organization on campus, you must first follow the process outlined by the Center for Leadership and Involvement (CFLI) at http://cfli.wisc.edu. Student groups must:

- Be a not-for-profit, formalized group
- Be 75% composed of UW-Madison students
- Be controlled and directed by UW-Madison students
- Abide by Federal, State, City, & University nondiscrimination laws & policies
- Identify a student to serve as the primary contact for the organization, along with three other student contacts. All four students must be enrolled at least half time at UW-Madison.
- Identify a student contact person who is authorized to represent the organization in their financial matters
- Abide by financial and all other regulations specified in the Student Organization Handbook.

As a College of Engineering (CoE) affiliated student organization, also registering your student organization with the Student Leadership Center (SLC) gives you access to several other benefits and services that are not available through the CFLI.

Each CoE organization must register once a semester by completing the online form at http://slc.engr.wisc.edu/uw-only/form_organizations.html. Certain Tiers need to submit additional information, including:

- A budget listing all anticipated income and expenses for the semester/year
- A current membership roster
- A list of general meeting dates and times
- A general meeting agenda

Presidents of Tier 1 organizations and the four executive officers of Tiers 2 and 3 are required to attend the mandatory New Student Leader Orientation offered each semester. An in-person meeting between the organization’s treasurer, an authorized purchasing agent from the group, and the financial specialist at the SLC is also required of organizations with a university account.

Yes, your organization has to register every semester. As you may know, organizations can change throughout the year – leaders transition in and out, accounts fluctuate, and so on. In order for us to serve you well and be in compliance with State of Wisconsin laws that govern the SLC, we need updated information about your organization each semester.
STUDENT ORGANIZATION TIER SYSTEM

Recognizing the range of purposes, varying levels of risk and financial structures and responsibilities that student organizations may possess, the SLC has developed a tier-system to define the level of involvement and support needed of student organizations in the College of Engineering. These three distinct levels all require registration with both the Center for Leadership and Involvement and the SLC for access to the benefits listed for each.

- **Tier 1** — A Tier 1 group is categorized as a student organization with active membership numbers less than 10. These groups traditionally organize lower risk or smaller scale events and activities and do not hold an account with the university. Tier 1 organizations are not sponsored by a CoE department, nor do they require full SLC support or resources.

- **Tier 2** — Tier 2 organizations are characterized as groups with between 10 and 50 active members. These organizations participate in moderate risk events and activities and hold an account with the university or are sponsored by a CoE department. Tier 2 groups coordinate with the SLC and may require budgeting and programming support in planning and executing programs and events.

- **Tier 3** — Tier 3 organizations have membership numbers greater than 50. Tier 3 groups hold an account with the university or are sponsored by a CoE department. These organizations coordinate moderate to higher risk events and activities. This tier of student groups receives full support and resources available through the SLC.

**Benefits of the Tier 1**

Tier 1 organizations will receive the following benefits:

- A listing on the Student Leadership Center Web site
- A Computer-Aided Engineering (CAE) account for email and web space
- Eligibility to apply for Polygon in-meeting and out-of-meeting funding
- The ability to reserve meeting rooms in the ECB for free through the SLC
- An invitation to participate in the Engineering Bash to promote their organization to incoming students

**Registration Requirements for Tier 1**

Tier 1 organizations are required to register once a semester via the online form on the SLC Web site. No additional information is needed; however the President from each Tier 1 organization must attend the mandatory new student leader orientation in order for their registration to be valid.
Benefits of Tier 2
Tier 2 organizations will receive the same benefits of Tier 1, with additional support and resources, including:
- Authorization to reserve UW or State of Wisconsin fleet vehicles for travel through the SLC
- Assistance with ordering bulk office supplies at a discounted rate
- Access to funds in the organization’s university account
- State of Wisconsin Procurement Card use privileges
- Limited office space in the Engineering Centers Building (ECB) on a two year rotation schedule and appropriate hardware and software to operate
- Use of the Electrical and Computer Engineering (ECE) Copy Center for organization related print and copy jobs

Registration Requirements for Tier 2
Tier 2 organizations are required to register the organization once a semester via the online form on the SLC Web site. In addition, they are required to submit:
- A current membership roster
- A projected budget listing income and expenses for the semester
- A list of general meeting dates and times
- A copy of a general meeting agenda

The executive officers (president, vice-president, secretary and treasurer) of each Tier 2 organization will need to attend the mandatory new student leader orientation session once in order for their registration to be valid. The treasurer from each organization, along with one designated purchasing agent from the group, will also be asked to meet with the Financial Specialist in the SLC in order to access funds from their university account.

Benefits of Tier 3
Tier 3 organizations will receive the same benefits of Tiers 1 and 2, with additional support and resources, including:
- Guaranteed and permanent office space in the ECB as long as the organization remains at Tier 3

Registration Requirements for Tier 3
Tier 3 organizations are held to the same registration requirements as Tier 2. Additionally, Tier 3 organization advisors will be asked to attend the advisor orientation session once a year or meet individually with the staff of the SLC for the purpose of maintaining good communication between the organization, advisors and SLC staff and sharing current information regarding policies and procedures.

NOTE: General meetings, panel discussions or departmentally sponsored activities are considered lower risk activities. Moderate to higher risk activities include (but are not limited to): competitions, dances, concerts, conferences, camps, clinics and travel.
CREATING A CONSTITUTION AND BYLAWS

One of the requirements for being a registered student organization at UW-Madison is to submit a constitution, bylaws, or set of operating procedures to the Center for Leadership and Involvement. A constitution is an important organizational document that outlines the basic rules governing your organization, allows for continuity and addresses any situations that may arise within an organization, such as member conduct. Simply put, a constitution and bylaws outlines how your organization will operate and should be reviewed annually to ensure that it fits the current needs of the organization.

Language in a constitution should be clear and concise, leaving little to interpretation. The length can vary from one page to several pages, depending on the complexity of the organization.

Components of a Constitution and Bylaws

- **Name/Purpose**—State the official name of the student organization and its purpose and goals.
- **Membership**—List all qualifications, requirements, rights and responsibilities, along with a removal process for membership within the organization.
- **Officers**—List the titles and responsibilities of each officer in the organization, including qualifications to become an officer and the removal process for officers that do not fulfill their responsibilities. The four basic “executive” positions are President, Vice President, Secretary, and Treasurer. Depending on the needs of the organization, additional positions may be created to lead efforts in fundraising, industrial relations, outreach, publicity, and more.
- **Elections**—State the method and frequency of elections, including who is eligible to vote and all other conditions that must be met before members can become candidates for office.
- **Advisors**—State the general duties and responsibilities of the faculty/staff advisor appointed to your organization.
- **Finances**—State the organization’s financial practices, including how money is handled, where money is kept and who has access to the organization’s funds.
- **Amendments**—Include any requirements for the form or manner in which amendments can be made to the constitution, including any limitations for the presentation of a ratification of an amendment, and the margin of votes required for an amendment to pass.

Bylaws are typically used in conjunction with a constitution and deal with the day-to-day rules governing the organization (meetings, standing committees, etc.). The bylaws should be easy to amend, as the day-to-day operations of the organization may change often.
SAMPLE CONSTITUTION AND BYLAWS

ARTICLE I
NAME AND OBJECTIVE

Section 1 This organization shall be known as the ___________________________ at the University of Wisconsin-Madison.

Section 2 The objective/purpose of this organization shall be to _________________________________________________________________.

ARTICLE II
MEMBERSHIP

Section 1 Membership is open to any enrolled student of UW-Madison who _________________________________________________________.

Section 2 This organization will not discriminate on the basis of race, color, creed, sex, sexual orientation, age, national origin, ancestry, disability, marital status, pregnancy, political affiliation, identity as a veteran or military service membership.

Section 3 The fiscal year of the organization, shall be from ________ to _________. The amount of annual dues shall be determined each year by ______________. Dues shall not exceed $____________ per year.

ARTICLE III
OFFICERS

Section 1 This organization shall have a President, Vice President, Secretary and Treasurer, who comprise the Executive Committee or Board. All officers must be members of the organization to maintain their position. Each appointment will hold a term of ____ years.

Section 2 Election of officers shall be held annually in _______________. At least two weeks notice shall be given before the election meeting. Nominations shall be initiated from the floor and elections done by a ballot. Each member in good standing may vote. A quorum will be considered ___ members. The person receiving majority vote will be elected.

Section 3 Any officer may be removed from membership by a two-thirds vote of the Executive Board. Any officer removed may appeal to the general membership and be reinstated with two-thirds approval vote by the members.

Section 4 Any officer vacancy which may occur prior to annual elections shall be filled by appointment by the president.
ARTICLE IV
RESPONSIBILITY OF OFFICERS

Section 1 The President, as elected annually by the members of the organization, will be responsible for coordinating the organization. The President shall preside at all meetings of the Executive Committee or Board and at all chapter meetings where the proceedings are of a business nature. The President shall oversee all official chapter activities, finances, the Board and yearly programming.

Section 2 The Vice President shall fulfill the duties of the President in case of his/her absence or disability. The Vice President shall serve as chairperson of the program committee and shall be responsible for all organization programs and activities.

Section 3 The Secretary shall be the custodian of all the permanent records of the organization. The Secretary shall prepare agendas and keep minutes of all meetings. The Secretary will maintain membership records. The Secretary will oversee all official newsletters and external membership mailings.

Section 4 The Treasurer shall have charge of all organization funds and shall disburse such funds as deemed necessary. The Treasurer shall keep accounts in books belonging to the chapter, which at all times shall be open to inspection by any member of the chapter in good standing. The Treasurer will deposit all funds in the name of the organization into a bank account approved by the Executive Committee or Board, or a University account governed by the Student Leadership Center in the College of Engineering. The Treasurer may issue and sign all checks drawn upon organization funds and will prepare budgets and supply the President with a report of receipts and disbursements monthly. At the end of the Treasurer's term of office, all funds, records, papers and other organization property shall be transferred to his or her successor.

ARTICLE VI
MEETINGS AND ACTIVITIES

Section 1 General meetings of this organization shall be held on ____________ at ________ in ____________. Executive Committee or Board meetings shall be held on ____________ at ________ in ____________.

Section 2 Other meetings and activities shall be organized to coincide with the goals outlined in Article I, Section 2.

Section 3 Special or emergency meetings may be called by the Executive Committee or Board.

Section 4 All meetings shall include a quorum, agenda and minutes.
ARTICLE VII
AMENDMENTS

Section 1 This constitution and bylaws may be amended by a two-thirds vote of the members. Notice of proposed amendments shall be given one meeting prior to the date at which the amendment will be voted upon. Amendments must be submitted in writing.

ARTICLE VIII
RULES OF ORDER

Section 1 The rules contained in the current edition of Robert’s Rules of Order, Newly Revised shall be the basis of authority for the organization and shall govern in cases not covered by the constitution and bylaws. However, if these Rules hinder proceedings, members may vote to set the Rules aside for greater expediency. If there are any objections to foregoing the Rules, a majority of present members must agree to lay them aside.
ORGANIZATIONAL STRUCTURE

Roles and Responsibilities
Defining roles and responsibilities for positions within the organization is a key component of success. By providing written responsibilities associated with specific positions, individuals in those offices know exactly what to expect when getting involved. This eliminates confusion around who does what and reduces any overlap in time and energy. Clearly defining roles can also create a sense of team responsibility; help accomplish goals; and allow for increased productivity. Job descriptions should be provided to anyone interested in a position within your organization.

Officer Positions
Delegating responsibility is definitely needed for organizations that are large, growing, or even just getting started. As discussed in the “Creating a Constitution and Bylaws” section, the four basic “executive” positions of any organization are President, Vice President, Secretary, and Treasurer. After these positions are elected, the creation and election of other officer positions may occur. Depending on the needs of your organization, some of these positions may include Webmaster, Fundraising Chair, Industrial Relations Chair, Outreach Committee Chair, Marketing Manager, Event Planner, Membership Chair, and more.

Delegation does not end here, however. A key to increased membership participation is not only through the programs and events your organization hosts, but also through committees that need membership involvement. Creating committees decreases officer responsibility; teaches others about the roles within the organization; opens communication up between general membership and elected officers; and hopefully gets more accomplished. This is also known as teamwork!

Policies and Procedures
Documenting policies and procedures within an organization is extremely important. Even if there are key individuals within the organization who know how things are done, written guidelines allow those operating procedures to continue for many years, even after those individuals have moved on. Include any policies and operating procedures in the Constitution and Bylaws, but also include more in depth information about each of them in the turnover files for new officers.

Every organization should keep a turnover binder to pass on to new officers year after year. This binder can help to inform new members, officers and advisors about the mission and goals of the organization, standard practices, what has worked well and what maybe hasn’t, etc. Make sure the information stays current and up-to-date.
ELECTION OF OFFICERS

To make sure that your organization recruits the best officers possible, elections should be run professionally and advertised well. Officer elections are typically held during a general meeting of the organization. Elections should be announced at least two weeks prior to the date they will be held. In the announcement, include detailed information about the date, time and location of the elections; open positions and descriptions of the duties and responsibilities of each, including terms; and what to expect on and how to prepare for Election Day.

Information about the election process and all open positions should be available as a handout on the day-of the elections as well. Nominations of candidates can be handled using one of the following methods:

1. Take all nominations before elections begin, or
2. Take nominations as positions are filled

If taking nominations before the elections begin, it does not matter which position is voted on first. If taking nominations as positions are filled, then the most important positions should be elected first. This allows members who are not voted into preceding positions to continue running for subsequent positions as they are addressed. Encourage candidates to keep election speeches brief in order to keep the process moving, yet allow for each candidate to state their case as to why they believe they are the best person for the job.

Make sure there is an organized and confidential system for collecting votes. Ballot forms can be designed to allow for candidate names to be filled in at the last moment. Positive feedback from the audience about each candidate may be offered following the close of the election/nomination process, if candidates are asked to leave the room prior to and during the actual vote.

After all ballots are counted, notify candidates as soon as possible of the election results. Publically recognize and thank everyone who ran for a position. Immediately following the general meeting, get the new officers together to let them know what will happen next. Providing turnover files and having new officers meet with outgoing officers after the elections is good practice. Let each new leader know what is expected of them in the short term and what they should do to prepare for filling the position when their term begins.

Spring Elections are typically held after spring break, whereas fall elections are usually held two to three weeks prior to the end of the semester. New officers should take over the responsibility of their office two or three weeks after the elections are held in spring and as soon as the spring semester starts from fall elections.
OFFICER TRANSITIONS

New student leaders bring with them new ideas and often an incredible sense of energy and enthusiasm. They are giving up some of their free time to be involved, so be sure you give them a valuable experience in return. Remember how you felt when you first got involved and things you would have liked to have known up front.

Here are a few things to remember to ensure a smooth transition between officers:

- Have a formal, structured orientation plan for leaders assuming new positions.
- Develop written position descriptions detailing the level of commitment involved and the specific duties that will be required of them.
- Keep important documents for incoming leaders (e.g. meeting minutes, important dates and deadlines, contact people, internal processes, etc.). Review the turnover files with incoming leaders as part of transition process.
- Provide opportunities for members to practice new skills and tasks (event planning, meeting administration, etc.).
- Have incoming leaders shadow the outgoing leaders for a period of time before the transition occurs.
- Make sure all new student leaders know where to access the Student Organization Handbook and have them review it prior to their taking on an executive or chair role.
- Outgoing officers should introduce new leaders to any key members in the organization.

Turnover Files

As stated on page 6, every organization could keep and maintain a turnover binder with important historical information related to your student group. This binder should include:

- A copy of the organization’s constitution and by-laws
- Complete position descriptions for each officer
- Meeting minutes, agendas and reports for the past year
- Fliers, receipts, and supplementary materials from past programs and events
- Event evaluations and any lessons learned
- Information on current projects
- A description of the organizational goals and objectives
- A timeline/calendar of events, including important dates and deadlines
- Contact information for campus resources
- A copy of the annual budget and information about any and all financial accounts (including passwords)
- Tricks of the trade and any tips for new officers
ADVISORS

Although the university does not require every registered student organization to have an advisor, the College of Engineering (CoE) does. In order to fully register with the Student Leadership Center, your organization must identify a CoE faculty or staff member to serve as your advisor. Advisors can be valuable assets to the organization and may provide access to resources that general members can not. The SLC can assist you in identifying an advisor if your organization doesn’t currently have one.

If you do not have an advisor:

- Make sure you have a clear picture of the roles and expectations you’d like this person to play, so that you can communicate effectively with potential candidates.
- Talk with employees of the department your organization is most closely related to identify an advisor.
- Look up faculty and staff profiles on the CoE Web site to find out their interests to determine whether or not they’d be a good fit for your group.
- Ask other organizations where they found their advisor.
- Talk with faculty and staff you already work with about your need to find an advisor—they may be interested or know of someone else who might be.

Once you have an advisor:

- Schedule a meeting between the officers and your advisor to discuss and review the organization’s constitution, budget, membership roster, program and event plans for the year.
- Invite your advisor to general and/or officer meetings, programs and events.
- Maintain regular contact with your advisor and copy them on important communications about your organization.
- Seek their advice and assistance on issues that come up throughout the year, including conflict between members, budgetary concerns, etc.

Advisors can be as active or as hands off as you’d like them to be, as long as you clearly communicate shared expectations. Advisors can also be quite helpful in orienting new members and officers; educating the organization about university resources, rules and regulations; and providing historical data and information about past programs and traditions.

Make sure your advisor knows where to find information pertinent to their role with your organization, such as the online Advising Handbook at http://cfli.wisc.edu/handbook/08-09/advisors.htm. The SLC hosts an Advisor Orientation every fall and the Center for Leadership and Involvement also offers workshops for advisors throughout each academic year.
STRATEGIC PLANNING

Strategic planning is a very useful tool for managing a student organization. Strategic planning can help you define and communicate the direction for the organization, thus creating a shared understanding among those involved so that members will be working towards the same goals as they fulfill their individual responsibilities within the group. Below are the vital components of strategic planning:

Mission
A mission statement is a concise description of the purpose of the organization. It should include what the organization hopes to achieve, as well who the organization will serve. Forming a mission statement should be done with the key stakeholders of the group and should also be “visionary” in nature. According to Wikipedia and Vern McGinis, a mission statement should:

- Define what the organization is
- Define what the organization aspires to be
- Be limited to exclude some ventures
- Be broad enough to allow for creative growth
- Distinguish the organization from all others
- Serve as a framework to evaluate current activities
- Be stated clearly so that it is understood by all

Goals
After the mission statement has been developed, the organization needs to set specific goals that are aligned with the mission to ensure a consistent direction for the future of the organization. Officers within the organization may have individual goals for their term in office. A common way to document these goals is to simply have each officer write down the two or three things they would like to accomplish while in office to keep in a permanent file.

Action Plan
While goals help an organization move toward the future, it is important to have a concrete plan to make sure those goals are achieved. Action plans are useful tools for ensuring that tasks are completed in a timely manner. Usually, an action plan consists of the following:

- The task to be completed
- The individual to whom the task was assigned
- The due date of the task
- A space to indicate when the task is completed and any notes

By assigning tasks to specific people with due dates, there is accountability for the items that need to be completed to achieve each goal. Timelines are also useful because they show a list of all the action items and the sequence in which each of those tasks will be completed.
BUDGET AND FINANCES

Every student organization is responsible for keeping and maintaining a budget. Having a budget helps define the goals of your organization as well as to establish guidelines for each academic year. Budgets should include income and expenses for each meeting and event that will occur throughout the year. The SLC requires that both Tier 2 and 3 CoE student organizations submit a budget at the beginning of each semester as part of the registration process (see page 22 for a template).

In developing a budget for your organization, there are several factors to consider. If you are a new organization you must first determine an operating budget and where you will secure startup funds to get you off and running. If your organization is brand new and does not have a bank account, visit the Center for Leadership and Involvement’s Web site at http://cfli.wisc.edu/handbook/08-09/banking.htm for more information.

Income
Income for your organization should include any money generated from membership dues, program revenue, ticket sales, fundraisers, gifts or donations. Under State of Wisconsin laws and university regulations, if you have an account with the university, donor gifts MUST be used as the donor intended, therefore if you receive a gift that is intended for educational programming it MUST be used for educational programming. If you spend it on something else instead, you will be required to reimburse your university account with your own funds.

UW Foundation
The University of Wisconsin Foundation (UWF) is the official fundraising and gift-receiving organization for the University of Wisconsin-Madison, therefore all gifts received from individual donors or corporations (large and small) must go through the UW Foundation. The UWF works with groups and departments on campus to properly thank donors, record donor intentions, and provide a tax-deductible way for individual donors and corporations to give money. The SLC works in partnership with the UWF to route money to the correct student organization, via the Engineering Student Opportunities Fund.

Please have all donors send their checks made payable to the University of Wisconsin Foundation, along with a cover letter stating the gift amount, intended use or purpose of the gift and their contact information to:

University of Wisconsin Foundation
U.S. Bank Lockbox
P.O. Box 78807
Milwaukee, WI 53278-0807

If a donor would like to use a credit card to make a gift to your organization, you may provide the following link for them to make an online gift:
In both cases, please be sure to tell the donor to indicate the name of your student organization on the memo line (of the check or on the online giving page).

If your organization receives a check directly from a donor (via snail mail or in person) all checks must be brought to the SLC within 48 hours of receipt for processing. Please include detailed information about the gift, including its’ intended purpose to accompany the check. It is also very important for you to thank the donor for their gift.

**Expenses**

There are always unforeseen costs involved in running an organization, so it is wise to allocate some funds for these unanticipated expenditures. When developing your budget determine what activities and events you would like to plan during the year and develop an individual budget for each. Ask yourself:

- How much do you expect each event or activity to cost based on previous years and/or current research?
- What items will need to be purchased in order to successfully complete your program goals? (Remember to factor in the cost of each individual item.)
- Based on your anticipated budget, do you have enough money in your account to cover all of the costs?

You may need to reevaluate or realign your programming to stay within your budget. Consider partnering with another student organization to keep costs down. By collaborating with other groups on campus, you can create lasting partnerships and share resources to host a more successful event.

Once you have determined your budget and submitted a copy to the SLC, you will need to meet with the Financial Specialist in order to access funds in your University account. If you do not have an account with us, we will not be able to provide financial oversight and assistance to your organization. If you have both an on- and off-campus account, keep separate records for each, maintaining all receipts and documentation of expenditures and financial transactions, electronically and in a turnover binder.

There are two ways to spend money in your student organization’s account:

1. The State of Wisconsin Procurement Card, and
2. Check Request (which can take up to 2 weeks to process)

All expenses that are for food and/or beverages must be accompanied by a Headquarters City Form. You must request a Headquarters City Form from the SLC 4-6 weeks in advance of the need to purchase refreshments. If you require refreshments for a general meeting, a blanket Headquarters City Form can be submitted once a semester so that you do not need to fill one out for each general meeting.

*Please remember that in order to request money from your student organization’s university account the organization must be fully registered with the SLC.*
State of Wisconsin Procurement Card

The most popular way to spend money available in your student organization account is the State of Wisconsin Procurement Card (“ProCard”). As an SLC registered student organization, you may request use of the ProCard. If your request if approved, then you can come to the SLC and use the ProCard, by calling in an order, or placing your order online, which are the preferred spending methods. In unique situations, you may be able to check the card out, use it at a local vendor, and return the card on the same day.

It takes 48 hours to review each and every request to use the ProCard. The SLC will not grant requests that do not adhere to the 48 hour rule. All student organizations are required to adhere to the ProCard policies and procedures as outlined below or you may not be able to access the funds in your university account.

1. The Treasurer and a designated purchasing officer must attend a training session with the financial specialist at the SLC and complete the Designated User Agreement Form (page 20). Each group is allowed to authorize two members, in addition to the Treasurer, to use the ProCard.

2. The treasurer must contact the SLC to request use of the ProCard. The request must be sent at least 48 hours in advance. If the request is for a special event, a special event meeting will have to take place at least 6 weeks prior to the event.

3. If the purchase is approved, the SLC will set up a time for the purchasing officer to come to the SLC and make the purchase. The ProCard is only allowed out of the office if the purchase cannot be made online or over the phone and is never available for use overnight or on the weekend.

4. If the purchase is for food for a meeting or special event, then a Headquarters City Form will need to be completed and approved before the purchase can be made.

5. All supporting documentation is required at the time of the purchase justifying the business purpose of the expense (an event brochure, agenda, and list of participants).

6. A ProCard Purchase Form (page 21) and ProCard Check-out Form must be completed and turned in to the SLC staff in order to use the ProCard.

7. The ProCard can be used like any other credit card. You must obtain all receipts (both the itemized and credit card copy) for any purchase made on the ProCard and submit them to the SLC upon return.

8. If the ProCard is taken out of the office it is due back immediately after the purchase is made. It may be left in the SLC drop box.

Receipts, updated participant lists, and any changes on the ProCard Purchase Form must be turned in or electronically sent to the SLC within 24 hours of the time of purchase. If the SLC is closed when you come to turn in required receipts and forms, you may place the documents in the SLC mailbox on the first floor of the Engineering Centers Building near the University Avenue entrance, or you can put them in the key drop box located next to the doors of the SLC.

We expect all students to respect and adhere to these policies and procedures. SLC staff members are unable to change these rules as they are governed by the State of
Wisconsin. NO exceptions can be made.

Supporting Documentation
If you are buying food for a general meeting (ex. pizza from Ian’s) or event/office supplies (ex. envelopes from Office Depot), you will need to submit an itemized receipt (not just the credit card receipt) detailing what was purchased. Be sure to tell the vendor that you are using a State of Wisconsin purchasing card and that the purchase should be tax-exempt. The tax exempt number is printed on the card.

When making purchases for a special event (including room rental fees), you must submit a completed Special Event checklist, an event brochure or flier, a program agenda, the list of participants, and itemized receipts and/or invoices for every purchase made for that event.

Remember that all receipts must be turned into the SLC within 24 hours of purchase. If you are unsure of what you need to submit, drop us a line and ask: slc@engr.wisc.edu.

ProCard Misuse Policy
Use of the ProCard is a privilege granted to engineering student organizations who register with the SLC. We expect our student leaders to respect and comply with all State of Wisconsin, University of Wisconsin and CoE/SLC policies and procedures. Non-adherence to the ProCard Use Policy and/or Designated User Agreement by a student organization member may result in revocation of ProCard use privileges. ProCard misuse includes purchasing items on the prohibited list; giving the ProCard to an unauthorized person to use; not submitting appropriate documentation and receipts to accompany all purchases; and not returning the ProCard and/or receipts on time to the SLC.

Consequences of ProCard misuse are as follows:
- First offense will result in a meeting between the Director and Financial Specialist of the SLC and the individual(s) that misused the ProCard before any further use will be allowed.
- Second offense will lead to a one month suspension of that individual’s access to their student organization’s funds. A letter detailing the offense will be sent to the organization’s president and advisor and also placed in the student organization file at the SLC.
- A third offense will revoke the individual's access to their organization’s funds for the remainder of the academic year. This may require the organization to refill that individual's position.

In most misuse cases, the student organization member who is found to have misused the ProCard will be required to reimburse the SLC for any unauthorized charges.
UNIVERSITY OF WISCONSIN – MADISON
Purchasing Card Designated User Agreement Form

CARDHOLDER’S NAME: Eve Ferguson DEPARTMENT: Student Leadership Center

DESIGNATED USER’S NAME: ____________________________________________________________

The UW-Madison Purchasing Card is intended for best judgment purchases under $5,000. All purchases with this card must comply with the guidelines in the University of Wisconsin-Madison’s Cardholder Guide, Purchasing Services How to Purchase Goods and Services and with all extramural funding agency restrictions. The following items ARE NOT to be purchased using this card:

- Air conditioners
- Alarm (security) systems
- Alcoholic beverages
- Capital equipment or capitalized components
- Ammunition/weapons
- Biological safety cabinets
- Cash Advances
- Controlled substances
- Gasoline
- Hospitality expenses (food/flowers/plants)
- Insurance
- Legal services
- Motor Vehicles
- Non-business purchases
- Printing (in excess of $50)
- Tax reportable services (those requiring 1099 reporting)
- Radioactive materials
- Temporary Help
- Travel and travel-related expenses
- Capitalized components
- Insurance
- Temporary Help
- Travel and travel-related expenses

There may be exceptions or additions to the above. Please refer to “Purchasing Policy & Procedure (PPP) #4 - Special Approvals.” If you have questions, please contact your Dean’s office.

LOST OR STOLEN CARDS - If the card is lost or stolen, the designated user will notify the Department/Business/Finance Office immediately.

Non-adherence, misuse, or consistent lack of documentation to support purchases may result in revocation of cardholder privileges for the individual and/or department/division. The employee will reimburse the University for unauthorized purchases. If not reimbursed within 30 days, the amount will be deducted from the employee’s next paycheck.

AGREEMENT FOR DESIGNATED USER

As a designated user of this purchasing card, I agree to accept the responsibility for the security and proper use of this card as described above.

Signature ___________________________________________ Date ______________

AGREEMENT FOR CARDHOLDER

As the holder of this purchasing card, I approve the occasional use of this card by this designated user, and assume overall responsibility for the card.

Signature ___________________________________________ Date ______________

Signature ___________________________________________ Date ______________
(Site Manager, also print/type name)

Signature ___________________________________________ Date ______________
(Department Chair, also print/type name)

Signature ___________________________________________ Date ______________
(Principal Investigator, required if purchase is to be paid from a grant/contract)
Procard Purchase Form

REQUIRED PRIOR TO PURCHASE
☐ E-mail from your organization’s treasurer to slc@engr.wisc.edu authorizing the purchase.
* If the treasurer is making the purchase an e-mail from the organization’s president is required.
☐ Approval from the SLC

REQUIRED WITHIN 24 HOURS OF PURCHASE
☐ Procard
☐ Original receipts
☐ Completed Procard Purchase Form
☐ Other documentation as explained by SLC staff
   (event brochure, agenda, list of participants)

Name ______________________________________________________________________
E-mail _____________________________________________________________________
Organization __________________________________________________________________
Date of use ________________________________________________________________
Vendor name __________________________________________________________________
Amount _____________________________________________________________________
What was purchased and why ________________________________________________
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Do not write below line. For SLC office use only.

Last 3 numbers of Procard ____________________________________________________
Funding string to be charged __________________________________________________


# (ORGANIZATION NAME) BUDGET FOR 2009-10

<table>
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<tr>
<th>INCOME</th>
<th>Budget 09-10</th>
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<th>Budget 08-09</th>
<th>Actual 08-09</th>
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RECRUITING AND RETAINING MEMBERS

So, now that you have a constitution and bylaws, a strategic plan, an advisor, officers and a budget, you might be wondering how to recruit members. New members are vital because they bring new ideas and new energy and can fill gaps left by members who aren’t active or no longer wish to be involved. Current members should understand the vision of the organization so they can effectively communicate what the organization is all about to potential members.

You should start the recruiting process by setting some goals and asking yourself:

1. How many members can you assimilate into the group?
2. Who is the target audience you want to attract?
3. What common interests should members have?
4. What makes your organization unique?
5. Why would someone want to be involved?

Brainstorm methods to reach your goals and add any important recruiting dates or events to your calendar to make sure you don’t miss a good opportunity to attract new members. Some key recruiting events on campus include the Pre-Engineering Bash, which takes place during the week before school starts each Fall; the Student Organization Fair, sponsored by the Student Organization Office (SOO), which happens once a semester. You may also want to take a free ad out in The Badger Herald student newspaper’s welcome back edition student organization guide.

In order to really get the word out about your organization, you will need to develop some promotional materials to distribute to potential members, so they have something to walk away with and remind them of your organization after the initial contact. You might try to tap into existing member talent to help design posters, flyers and banners to promote the organization.

When looking to attract students, advertise all meetings and events throughout the year and approach every meeting like a kick-off meeting. You never know when somebody new might attend a meeting to learn more about the organization. Invite friends and roommates to events and meetings to try to get them involved. Talk to faculty and staff about your organization, so they can inform students they meet with who are looking to get involved about who you are and what you do.

In recruiting new members, word-of-mouth is the best and least expensive method of publicity. Personal contact with people current members know usually attracts the best and most active members. Talk about your student organization and its accomplishments whenever possible and appropriate.

Co-sponsoring programs and events with other student organizations is also a great way to attract new members.
Some key benefits of getting involved in any organization that you will want to promote are:

- Meet new people and make new friends
- Enhance current skills and learn new skills
- Build your resume
- Be exposed to leadership opportunities on and off campus

Recruitment of new members doesn’t have to be a one-shot deal. Find ways to continually recruit new members and promote your organization. Evaluate each recruitment effort after the fact to figure out what works and what doesn’t for your organization. And ask current members what made them get involved...

So now that you’ve got some new members on board, how will you keep them? Make your members feel wanted, needed, and appreciated at all times. Plan a special event or meeting to welcome new members to the group and give them a chance to get to know the other people involved. Orient new members to your organization’s goals and objectives, structure, rules and norms so they fully understand what is expected of their involvement. Make members feel useful and a part of the group by asking them what they would like to be involved in and assigning tasks that match their interests and are within their skill level.

And most importantly, remember to have fun! Try a new icebreaker or team building activity. Set aside time to socialize, get to know each other, and celebrate your successes. If all you do is work, then your members may lose interest and feel like their involvement is a burden.

For icebreaker ideas, check out the SLC Library. We have a variety of resource materials available for check out on organizational and leadership development, team building games, group activities, and more.
RUNNING EFFICIENT MEETINGS

Efficient meetings are vital to the success of your organization. Herbert Hoover said “When the outcome of a meeting is to have another meeting; it has been a lousy meeting”. To make the most of yours, here are some helpful guidelines to follow.

**Meeting Preparation**

Students are often involved in more than one organization, so try to choose a meeting time that doesn’t conflict with other organizations. Keep meeting days and times consistent throughout the course of the semester so members can plan accordingly. Be sure to reserve space well in advance so you aren’t scrambling to find a room at the last minute. You can reserve conference rooms in the Engineering Centers Building through the SLC by sending an email request to ecb-room-request@engr.wisc.edu. The ECB Lobby and Research Presentation Room, along with the larger lecture halls in Engineering Hall can be reserved through Engineering Media Services by calling (608) 263-3163. For more information about available facilities and reservation processes, refer to pages 25-26 of this Handbook.

Define the purpose of each meeting and develop an agenda in advance, allocating a specific amount of time for each item. Distribute agendas and supporting documents to attendees at least one day in advance of the meeting and make sure you have designated someone to record the minutes. If you do not have a specific reason to meet, don’t just meet for the sake of meeting.

**During the Meeting**

Before launching into the agenda, take time to welcome and greet members and do a round of introductions or try an icebreaker if this is the first meeting of the semester. Review the agenda and clearly communicate goals for the meeting with all attendees. Stay on task and try not to deviate from the agenda. Utilizing audiovisual tools, such as a PowerPoint presentation, can help you stay on track. Honor member’s time by beginning and adjourning all meetings on time and remind attendees of the next meeting before you wrap up. Regardless of potential conflicts that may arise from the issues discussed in the meeting, always try to end on a positive note so that people will want to return.

**Meeting Follow-up**

Type up and distribute the meeting minutes in a timely manner and follow up on any tasks that were delegated during the meeting. Put any unfinished business on the agenda for the next meeting and ask officers for feedback on how the meeting went and how to improve future meetings.
FUNDRAISING, GRANTS AND SPONSORSHIP

Funding is an issue for most organizations, so you may be wondering how your student group can put some money in the bank to start planning programs and events. You can start by applying for the various funding opportunities available to student organizations on campus.

SLC registered student organizations may be eligible to apply for funding through the Polygon Engineering Student Council. Organizations must have representation at the annual elections; attend two-thirds of the general body meetings each semester; and remain registered with both the SLC and CLI to be eligible for funding. Polygon grants support a variety of activities; however, they do not fund food.

Polygon offers grants for expenses less than $500 ("in-meeting" funding requests), which are addressed at Polygon general meetings on an ongoing basis. Requests exceeding $500 ("out-of-meeting" funding requests) must be submitted following the policy outlined at http://www.engr.wisc.edu/studentorgs/polygon/?q=node/49 and by the noted deadline each semester, which is generally noon on the 3rd Friday of classes for the fall semester and noon on the 2nd Friday of classes the spring semester.

CoE departments may also be willing to help support your student organization, especially if your organization is affiliated with a particular discipline within engineering. If your organization is planning a large-scale event that has the potential to impact the entire CoE campus, you may want to apply for a grant through the Wide Event Fund by submitting a detailed proposal and budget request to Dean Cramer at cramer@engr.wisc.edu.

Additional Grant Opportunities on Campus
This list is by no means a complete list of funding sources at UW-Madison, however, these organizations and departments have consistently been supportive of student organizations over the years. Each grant has its own eligibility requirements and deadlines, so read each web site carefully before applying. Incomplete applications are rarely granted, nor do funding sources usually allow “do-overs”.

- Event Grants – Apply four weeks in advance for all requests under $6,000; six weeks in advance for grants over $6,000
- Travel Grants – Apply four weeks in advance for all requests under $5,000; six weeks in advance for grants over $5,000
- Operations Grants – Applications are available in December for the following school year to help cover printing, office supplies, postage, etc.
- Open Fund – Grants of up to $200 per group available until March 1st or until the money runs out

• Multicultural/diversity program co-sponsorship
• Must apply 60 days in advance for all requests over $2,500; 30 days in advance for grants under $2,500

Wisconsin Union Directorate Grants -
http://www.union.wisc.edu/wud/infoandresources.html
• Funding for costs associated with late night events on campus, Thursday through Saturday from 9 p.m. – 2 a.m.
• Co-sponsorship of committee related campus events.

Wisconsin Experience Grant (ODOS/SOO) –
http://soo.studentorg.wisc.edu/wi_exp_grant/soo.html
• Co-sponsorship for educational events on campus that support a welcoming and inclusive campus climate, up to $2000 per group/per year
• No financial support for student travel

WAA Student Organization Grants -
• Support for non-alcoholic events on campus
• Must foster diversity/inclusion on campus and include alumni component

Morgridge Center for Public Service Grants –
http://www.morgridge.wisc.edu/students/grants.html
• Small grants (up to $200) for local service projects or Alternative Breaks

UHS Grants -
http://www.uhs.wisc.edu/home.jsp?cat_id=110
• $50-500 for collaboration between two or more registered student orgs
• Events fostering diversity/inclusion encouraged

University Lectures Committee -
http://www.secfac.wisc.edu/lectures/lectcomm/PoliciesAndGuidelines.htm
• Support to host a distinguished lecture on campus

Kemper K. Knapp Bequest -
http://www.secfac.wisc.edu/knapp/Call.htm
• Can only apply with departmental sponsorship

Industry Sponsors
Corporations large and small may be interested in helping to support your student organization. When making contacts with industry representatives, talk about your involvement in a student organization and how it has enhanced your college experience. Provide them with informational brochures about the organization, so they have something to take away from the conversation. Many corporations visit the engineering campus during the Engineering Career Services sponsored career fairs. This is a great opportunity to identify potential contacts in the industry.
Past student organization leaders have found that industry sponsorship requests are more successful when mailed out in April, requesting support for the following academic year. This allows companies to include a gift to your organization in their annual budget, since many companies operate on a fiscal year of July 1- June 30, as opposed to a calendar year. If your organization decides they want to send out a mailing to request support from potential donors, please run a draft copy of the solicitation piece by the SLC Director prior to mailing. The SLC Director will work with the UW Foundation to ensure that the mailing is in line with UW fundraising practices.

When drafting a sponsorship request letter, be sure to include the following information:

- Name of your student organization and a brief overview of what you do
- Organizational mission and goals for the year
- Any achievements or highlights from the past year
- A list of potential funding opportunities (programs and events you’d like financial support for, with giving levels attached to each)
- Benefits of sponsorship/how the company will be recognized
- How to donate and who to make the check out to
- Contact information if they’d like to speak with someone

Remember that all donations should be collected through the UW Foundation to ensure that companies receive a tax deduction for their gift and an acknowledgement letter from the UW. If your organization would like an online giving mechanism for potential donors, the SLC can request a customized online giving link to direct gifts to the appropriate student organization fund. Please review page 13 for a refresher on gifts and the UW Foundation.

Most corporate gifts are for general support, however, if the gift is restricted for a specific use, you must use the money as the donor intended. And remember, it is very important to thank the donor! In addition to sending them a formal thank you letter, give the company a shout out at your event, include their logo in promotional materials and/or give them a special mention in your newsletter.
EVENT PLANNING

From general meetings to programs and events, your organization will be doing “something” throughout the year. Programming is the heart of most student organizations. Whether it is a fundraising, social, campus-wide, outreach or diversity event, following the event planning guidelines below should help make your program a success.

12 Weeks Out
- Determine the scope, purpose and name of the event/program (who, what, where, when, why)
- Identify potential dates and locations for event
- Determine your target audience
- Identify potential risk management issues
- Determine meeting/planning schedule
- Develop the event budget
- Determine the number of members and volunteers needed to plan and work the event
- Start listing logistical and supply considerations
- Identify potential partners
- Fill out a Special Event Checklist and contact the SLC with ideas and details

10 Weeks Out
- Finalize date, time, location (and speaker/entertainment, if applicable)
- Add event to student organization calendar online
- Think about event format/flow
- Start designing marketing materials

8 Weeks Out
- Order event supplies and materials
- Send marketing materials to print. Remember that student organizations are granted 500 free copies per semester. You may also utilize the Copy Center in Engineering Hall.

5 Weeks Out
- Confirm menus, room setup and supplies.
- Send out invitations (mail, e-mail, Web, phone)
- Recruit volunteers
- Publicize the event (press release; community calendars; chalking, etc.)

3 Weeks Out
- Establish a method to measure attendance/participation and capture contact information at the event
• Develop an assessment mechanism to get feedback from event attendees about their experience
• Meet with volunteers if needed

**1 Week Out**
• Send final reminder to all volunteers and the target audience
• Confirm numbers with the venue and/or catering staff

**Day Of**
• Arrive on-site at least one hour prior to the start of the event
• Check in with facility personnel
• Direct volunteers to their posts
• Oversee set-up, decorations, etc.
• Distribute and collect evaluations at the end of the event

**Post-Event**
• Recognize volunteers for their help before, during and after the event (send thank yous to participants as well, if you’d like)
• Evaluate what worked, what didn’t and any lessons learned for the next event
• Pay any outstanding invoices from the event
• Submit any required paperwork or supporting documentation the SLC

Please remember that SLC staff is here to help you! We’ve been through all of this before and can offer advice not only on budgeting for your organization’s events, but also on marketing and branding your event, publicizing your event and promotional opportunities, assessment tools and much more. We are not here to make things extra super complicated, but to ensure that your organization follows the processes that are already in place; adheres to UW, SLC and State of Wisconsin policies and procedures; and hosts a successful event.

Also keep in mind that when using the ProCard or submitting reimbursable expenses for food-related events, you must remain within the UW and State guidelines for price per person. Meal limits are as follows:

$8/person for breakfast
$9/person for lunch
$17/person for dinner/banquets

If you go over the set price per person, your organization will be responsible for paying the remaining balance on their own. You may want to charge a fee to attendees to cover the balance.

For more information and ideas about event planning for your student organization, visit the Student Organization Handbook online at [http://cfli.wisc.edu/handbook/08-09/handbook_home.html](http://cfli.wisc.edu/handbook/08-09/handbook_home.html).
SLC Policies and Procedures
Whatever type of event or program you are planning, it will likely require you to fill out a form with the SLC and submit supporting documentation, especially when spending money from your university account. As mentioned on Page 16, supporting documentation is evidence demonstrating the “who, what, when, where, why and how” money was spent or received, which is required of any and all exchanges of money in the State of Wisconsin system. Please obtain and keep all receipts, letters, emails, faxes, etc. regarding financial transactions related to your student organization.

If you will be purchasing refreshments, a Headquarters City Form is required, which you will need to obtain from the SLC well in advance of the purchase, even when only for a routine general meeting. If your student organization is completely registered (per the guidelines on page 1), then a blanket Headquarters City Form can be filed for the year so you do not have to fill out a separate form for each general meeting.

Any event that is not a general meeting is considered a “Special Event”, so here is what you’ve gotta do:

1. Obtain and fill out a Special Event Checklist (see page 37 for an example) 10-12 weeks prior to the scheduled event start date.
2. Email slc@engr.wisc.edu and set up a meeting with the SLC Financial Specialist to begin the planning process, discuss the budget and learn what expense requests will likely be approved and which will be denied.
3. Bring the completed Special Event Checklist with you to the meeting.
4. Submit all of the appropriate documentation, in a timely fashion to the SLC.

If your event is being funded from multiple sources, then supporting documentation needs to be provided to the SLC about each funding source, including who the money is coming from, when the money will be available and what the funds are earmarked for. Your expense requests will not be considered until this is received. ProCard requests for purchases exceeding $500 and/or that have multiple funding sources must include supporting documentation and evidence that is verifiable by the SLC staff in order for the request to be reviewed.

ECB Room Reservations
The Engineering Centers Building (ECB) offers small to medium size conference rooms that are free of charge to student organizations and can be reserved via the SLC by sending an email to ecb-room-request@engr.wisc.edu. Tong Auditorium is the largest room in ECB and can hold up to 98 people. It is also the most popular room, so it is important that you get your request in early.

Walk-in requests will not be processed unless the request is for a room that same day. Room reservation requests in the email inbox are processed daily and handled on a first come first served basis. Please allow 24 hours for a response to your request. Room
reservations must be submitted a minimum of ten (10) business days prior to the requested reservation date. Reservations for the summer term will be processed after April 1; fall semester requests will be processed after July 1; and spring semester requests will be processed after November 15th of each academic year. The SLC should be notified as soon as possible in the event of a cancellation.

When there are multiple requests for the use of the same space, priorities are:

1. College of Engineering Dean’s office activities
2. Meetings and events sponsored by a College of Engineering academic department, administrative office or SLC registered student organization
3. Activities sponsored by an organization, group, or individual not affiliated with the College of Engineering

Large scale college events, such as the ECS Career Connection or Engineering Expo will be given first priority for room reservation requests to accommodate their event. ECB rooms may not be available to other faculty, staff or student groups during special event dates and times. The ECB is closed during all home football game Saturdays. No exceptions can be made for reservation requests on those days. The UW Football team schedule is posted online at www.uwbadgers.com.

Student groups and/or food are not allowed in the Research Presentation Room (1025) with the exception of Polygon general body meetings. All groups using space in the ECB must adhere to the University Facilities Use Policies as outlined at http://www.wisc.edu/legal/FACILPOL.pdf.

All room keys must be returned to the SLC within 24 hours following your reserved day and time. Each key user will be allowed a three day grace period following their room reservation before a lost key fine of $75.00 will assessed. If the key was signed out and not returned by a student, a hold will be placed on his/her student record. If the key was checked out by a staff or faculty member, the fee will be collected through the Dean’s office.

The SLC has the right to deny or cancel a reservation at all times.

**Additional Facilities**
If your group would like to reserve a larger space on the Engineering campus, the ECB Lobby, room 1106 in the Mechanical Engineering building, or 1610 and 1800 Engineering Hall can all be reserved through Engineering Media Services at (608) 263-3163 or stevens@engr.wisc.edu.

Engineering Mall is a great outdoor location that can be reserved through Central Reservations at (608) 262-2511. Central Reservations requires two-week advance notice on all room reservations and can also reserve space in Union South, Memorial Union and other popular locations on campus. Any catering needs for events held in university facilities needs to be arranged through University Housing or Union Catering. If neither of those vendors are able to accommodate your catering needs, then your organization may seek an outside vendor.
Audio/Visual Needs
Contact Engineering Media Services (EMS) to address your audio/visual needs on the engineering campus. EMS can loan your organization laptops, digital cameras, camcorders, proxima projectors, and editing services (video editing). The SLC also has a digital camera available for checkout, along with a conference phone. These can be reserved through the same process as conference rooms in the ECB.

The Associated Students of Madison (ASM) has a TV-VCR unit with cart that registered student organizations can use free of charge in Memorial Union or Union South, as well as a video projector, overhead projector, slide projector, megaphone, and video camera. Contact ASM at (608) 265-4276 or visit their website at www.asm.wisc.edu/equip.html for details on how to reserve equipment. Equipment must be reserved at least one week in advance and students are responsible for obtaining the equipment, setting it up, tearing it down and returning it to ASM.

Guest Speakers
Guest speakers provide an opportunity for your organization to learn from past and present leaders in the field on a variety of topics. The following sources may assist you in identifying speakers you may want for an event or to invite to talk to your members at a general meeting:

- Adventure Learning Programs (ALPS): alps@redgym.wisc.edu
- Engineering Career Services (ECS): ecs@engr.wisc.edu
- UW Speakers Bureau: speakers@bascom.wisc.edu
- Wisconsin Alumni Association: waa@uwalumni.com

There are a wide range of topics that are of interest to student leaders. Topics to consider might be: recruiting, interviewing, resume writing, communication, team building, motivating members, etc. You may also consider assembling a panel of graduate students; past members of your organization who are now working in the field; or deans and professors in the College of Engineering. Be creative and think outside of the box.

When contacting a speaker, consider his/her area of expertise and how it applies to your organization’s interests and member base. Be sure to discuss your organization’s desires with the speaker in advance and establish a timeline and agenda for their presentation. Send a thank you letter to the speaker shortly after their visit to show appreciation for their taking time to come speak to your group.

Students are not authorized to sign contracts with speakers or entertainers if you will be using a university account to pay them. In those cases, a university representative must review and sign contracts on behalf of your student organization. Please forward all contractual agreements to the SLC Director. Read more about the required contractual process at http://cfli.wisc.edu/handbook/08-09/contracts.html.

Catering
Catering needs in university buildings typically have to be offered first to The Wisconsin
Union Catering or University Housing. If neither unit is able to accommodate your catering needs, then you may look elsewhere to have food brought in from an approved vendor in the Madison area. Any vendors doing business on the UW campus must meet university insurance requirements. The SLC can assist you with verifying that your desired caterer meets those requirements. Gumby’s Pizza, Asian Kitchen and Cousin’s Subs do not provide itemized receipts and therefore are not SLC approved vendors.

The Wisconsin Union catering services are available to all university sponsored academic groups, registered student organizations and government agencies. If you are reserving space through Central Reservations, then you should also offer your catering needs to the Wisconsin Union before looking elsewhere. Their catering policies are posted at:

UW Housing also offers full-service catering for events, from breaks and lunches, to buffets, served-banquets, fish boils and even picnics. If you are hosting a meeting or event in a UW dorm, then you should contact UW Housing first to assist you with any catering needs. You can send them an email at catering@housing.wisc.edu or call the catering manager at 262-5577 to check their availability.

For any food your organization orders for a meeting or event, you must stay within the state per diems, or charge an entry fee to recoup the extra costs over the fixed amounts if your organization does not want to pay the balance.

**Insurance**

The university is insured through the State of Wisconsin’s self-insurance program, and coverage is limited to liability caused by employees and agents of the university while in the course and scope of conducting official university (state) business. Student organization activities are not usually covered by the university’s liability insurance program unless a UW department is sponsoring the event.

For any program or event where there is a potential risk of injury or property damage, the Office of Risk Management can assist your organization in obtaining liability insurance for that event. This coverage is needed to protect your organization and your members from the financial risk of claims being made against them. Special event insurance is required in some cases, especially if hosting an event in a campus venue without a departmental sponsor. There is a charge for insurance coverage based on the type of event, the number of days and the anticipated attendance. For more information or for a quote, contact the Risk Management office at 262-8926, or visit http://www.bussvc.wisc.edu/risk_mgt/brochure.html.

You should always inform the SLC of any special event plans for your organization. We can assist you in contacting Risk Management, negotiating contracts, determining the best catering options and more. That is what we are here for!
Other Considerations

When planning an event, remember that hospitality shouldn’t stop at the door. Don’t plan on just a big bang at the beginning of your event, but also on how to engage guests throughout the entire event and send them home on a positive note. Especially with first-time attendees, the success of the initial event that brings them in can determine whether or not they ever come back.

Other items to consider are:

- Keeping remarks concise - You’ll lose people if a speaker goes on and on for too long about a single topic.
- Respecting people’s time – Think of how annoyed you can get when you are told an event will end at 5:00 and you don’t get out of there until 5:45…so stick to the agenda and time constraints you have advertised, no matter how difficult that might seem.
- Ambiance is important - Lighting, acoustics, background music and microphone volume can all contribute to the success of your event.
- Consider the event name - What you call the event can either attract or discourage potential attendees.
- Think about the “Big Picture” – Be sure the format, style and presentation match the speaker, topic, and venue. Would an interactive panel discussion be more appropriate than a lecture followed by Q&A?

Marketing

In marketing your event, think about your target audience. Make sure all brochures, fliers and posters for your event are attractive, visible and understandable. Double-check for accuracy before posting. Remember that University facilities are to be used primarily for students, faculty and staff, so any marketing you do off-campus should clearly state that the event is not open to the public (unless you have a departmental sponsor and appropriate insurance coverage).

Registered student organizations can promote their events on University kiosks, bulletin boards and in residence halls, however, you are not allowed to post on telephone or light poles, garbage cans, sidewalks, stairs/steps, fences, trees or buildings, and you must not destroy or deface other organizations’ posters. Posting in any of those places is a violation of UWS Administrative code 18.06 (17) and carries a $153.50 fine. It is also a violation of Madison Ordinance 23.02 and carries a $68.75 fine per occurrence.

Student organizations are also not allowed to leaflet or distribute fliers in classrooms. To promote your event in a classroom building, leaflets can only be distributed in the building lobby with permission from the building manager. Slipping pamphlets or fliers under room doors or going door-to-door in student dormitories is also a violation of the Student Organization Code of Conduct. Chalking is a popular way to spread the word to students, especially in highly trafficked areas, like Engineering or Library Mall, however, spray chalk is not allowed anywhere on campus.

Be sure to keep your web sites up to date and submit your event to the CoE events calendar (http://www.engr.wisc.edu/news/events/) and also to the UW-Madison events
calendar (http://www.today.wisc.edu/) to reach a broad audience. By posting to the UW calendar, your event will also appear in the Student Organization Offices’ “What’s Up?” email newsletter.

**CAE Login Screen Advertising**
The Computer Aided Engineering (CAE) login screens are a great way to promote upcoming events and programs within the College of Engineering (CoE). Login screen advertising is visible on all CAE computer screens throughout CoE, which are used by faculty, staff and students. Requests to reserve the CAE login screens to advertise student organization events must be placed through the Student Leadership Center (SLC). CAE login screens may only be used to promote events that are open to all CoE students.

**Scheduling**
1. All CAE login screen reservation requests must be emailed to slc@engr.wisc.edu. Reservation requests must include a brief description of the event, including the program name, sponsoring organization, dates and cost per person. Requests should clearly specify the dates the ad should run and include a file containing the login screen advertisement you wish to have posted.
2. CAE login screen reservation requests must be submitted a minimum of ten (10) business days prior to the requested reservation date and will be processed on a first come first serve basis. Requests to run an ad for more than 3 days may not be honored.
3. When there are multiple requests for use of the login screens on the same date(s), priority will be given in the following order:
   - College of Engineering Dean’s Office activities
   - Programs sponsored by a CoE academic department or administrative office
   - SLC registered student organization events open to all CoE students
4. Large scale college events, such as the ECS Career Connection, Engineering Expo or Innovation Days, will be given first priority for CAE login screen reservation requests to accommodate their event. Login screens may not be available to other faculty, staff or student groups during special event dates and times, up to five days prior and during the special event.
5. Reservation requests sent directly to CAE will not be processed. Please allow 48 hours for the SLC to respond to your request.

**Advertisement Specifications**
1. All CAE login screen advertisements should be submitted in a jpeg or bmp file.
2. Dimensions should be set at 1280 x 1024 pixels.
3. Ads should not include important information in the middle of the screen where the login box appears in the middle of all computer screens.
### SLC Event Checklist

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<thead>
<tr>
<th>Event</th>
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<tbody>
<tr>
<td>Organization</td>
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<tr>
<td>Event Planners</td>
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<tr>
<td>Event Date(s)</td>
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<td>Location</td>
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<td>Expected Participants</td>
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<td><strong>Budget</strong>&lt;br&gt;(attach details)</td>
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<td><strong>Funding/Registration fees</strong></td>
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<tr>
<td><strong>Sponsor Donations</strong>&lt;br&gt;(checks to &quot;UW-Madison&quot;)</td>
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<tr>
<td><strong>Gift Donations</strong>&lt;br&gt;(checks to &quot;UW Foundation&quot;)</td>
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<td><strong>Other Funding</strong></td>
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<td><strong>Activities</strong>&lt;br&gt;(speakers, banquet, etc.)</td>
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<td><strong>Other Notes</strong></td>
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WEB SITES, EMAIL ADDRESSES AND MAILBOXES

Each CoE registered student organization should have a Web site and email account, which is available through Computer Aided Engineering (CAE) at no charge. CAE is a facility that provides computing resources for the engineering campus. CAE labs are located throughout the CoE campus, providing access to Windows and Linux machines as well as laser printers, CD-burners, scanners and zip drives. Some of the labs are open 24 hours a day. CAE accounts are only available to students with engineering majors; students enrolled in an engineering course; or students who are actively involved in an engineering student organization. Having a Web site on the CoE server gives your organization credibility with potential members and industry representatives.

To request an email account or web space, the president of the organization should contact the SLC at slc@engr.wisc.edu. Please do not contact CAE directly, as they will forward all requests to the SLC for approval prior to setting up an account. In most cases, a student organization can request an account name tailored to the organization’s needs and organizational email accounts may also be set up to forward to an individual account if desired.

Please remember that your organization is a reflection of UW-Madison and the College of Engineering. Student organizations should make every effort to keep their Web site up-to-date, listing current events and contact information. Additionally, all responses to email inquiries from a student organization’s email account should be prompt and courteous.

DoIT offers free software training for students, including classes in Dreamweaver, a popular web design program. For a list of current classes offered by DoIT visit http://www.doit.wisc.edu/training/student/index.html. They can also set up customized training for your student organization if at least 8 members will be attending.

Organizations with office space in the Engineering Centers Building are automatically assigned a mailbox, in addition to the slots in each individual office door. Mailboxes are located by the University Avenue main doors and should be checked at least once a week. If your organization does not have an office, but would like a mailbox in the ECB, please contact the SLC to request one.
UNIVERSITY FLEET VEHICLES

Most student organizations will find that they need to rent a vehicle from time to time. Traveling is an opportunity for organization members to learn and grow by attending workshops and conferences, both regionally and nationally. State vehicles can be used by students or student organizations for official UW business, however, students and cannot reserve fleet vehicles themselves. Registered student organizations may only use university fleet vehicles if a university department has agreed to sponsor their use. As an SLC registered student organization, we can help secure vehicles for your organization to travel on official university and/or organizational business.

In order to drive a UW or DOA Fleet vehicle you must first become an authorized driver with the university. To do so, complete a Driver Authorization Form available at the SLC or online at www.bussvc.wisc.edu/risk_mgt/drivetable.html. Review the information on the Risk Management Web site to be sure you fully understand the policy and expectations governing student use of state vehicles.

If you have an out-of-state driver’s license or have had your Wisconsin license for less than three years, you must have the form notarized. It is your responsibility to identify a notary public, which are often available at banks or other financial institutions. With an out-of-state license, you will also need to attach a copy of both sides of your driver’s license to the authorization form. Once you have completed all of the necessary paperwork, submit the form to the SLC to be signed and faxed to Risk Management for approval. It may take up to 10 days for the authorization to be approved, so plan ahead.

Once you become an approved driver, you may reserve a vehicle through the SLC by filling out a Car Reservation Request Form by stopping by the office or emailing slc@engr.wisc.edu to request the form electronically. Car fleet reservations fill up quickly so please submit your reservation request at least 3 weeks advance. If a vehicle is available and the reservation is confirmed, the SLC will send you a confirmation number with details about how to pick up the vehicle.

Do not contact UW Fleet or the DOA directly to try to reserve a vehicle on behalf of your student organization. Your reservation will not be processed, as student organization reservations require additional information that only a department can provide. If there are no fleet vehicles available for the dates you need to travel, then you may reserve a vehicle off-campus. Enterprise Rent-a-car is the university’s preferred in-state car rental agency. Any car rental agency may be used for out-of-state travel.
COPYING AND PRINTING SERVICES

Printing brochures, meeting agendas, event fliers, and funding proposals make access to printing and copying services vital to organizational success. Due to university contracts and agreements, student organizations are required to use university printing services for all jobs. The SLC requires that all CoE student organizations include any copying or print job expenses in the projected budget that is submitted each semester.

Electrical and Computer Engineering (ECE) has a Copy Center that offers their services to student organizations. The ECE Copy Center is located in room 2415 Engineering Hall. Before the ECE Copy Center will process a print or copy request for your student organization, they will contact the SLC to verify that the job has been included in the budget and that the organization has funds available to cover all costs.

The ECE Copy Center periodically offers copier training sessions for student leaders. If you attend a training session, you will be given a user number so that you may enter the room to use the copy machines whenever you’d like between the hours of 7:00 a.m. and 3:15 p.m. The Copy Center is well equipped to handle large and more complicated print jobs, such as newsletters, booklets, brochures, etc. should be offered to ECE first. If the ECE Copy Center can not accommodate your request, you may visit another campus printing service location. ECE Copy Center hours, forms, contact and additional information can be found online at https://fpmwww3.fpm.wisc.edu/eceduplicating/Desktopdefault.aspx

Alternative printing services available on campus are:

1. StudentPrint (http://studentprint.rso.wisc.edu/)
2. DoIT Digital Publishing and Printing Service (http://www.doit.wisc.edu/printing/)

You may use the copy machine at the SLC for small copy jobs. Each student organization is assigned a copy code to access the machine. This code tracks the number of pages copied by your organization each month. The SLC will bill student organizations for use once a semester if your organization’s printing totals more than $10.
OFFICE SPACE

There are currently 35 offices in the ECB to accommodate over 55 student organizations registered with the SLC. Organizations that are granted office space in the ECB must agree to all terms and sign a lease with the SLC. Space will be evaluated and assigned based on the size of an organization, contributions to and impact on the College of Engineering, and functional needs, among other considerations. Policies are in place to ensure that space is allocated in a fair and consistent manner. Applications and copies of the complete lease terms are available in the SLC.

Minimum criteria for space in the ECB

1. Student organizations must be recognized and fully registered with both the Student Organization Office (SOO) and Student Leadership Center (SLC) in order to be considered for office space in the Engineering Centers Building (ECB).
2. Organizations must have a minimum of 10 active members in order to be considered for office space in the ECB.
3. Organizations must commit to using the office space for a minimum of 10 hours per week during the academic semester. The SLC will require every approved organization to post open “office hours” on the door, and one representative from the organization must be present during those times.
4. Student organization office space in the ECB may not be used for the sole purpose of storage.
5. Office space may not be used as laboratory space. Technical projects must be completed in the Discovery Center of ECB or in another appropriate location.
6. The organization requesting space cannot hold or occupy other office space on the UW campus.

Organizations who do not wish to have space in the ECB may apply for space elsewhere on campus. The Associated Students of Madison governs space in the new Student Activities Center in University Square. The Wisconsin Union may also have space available in various buildings. You will need to contact those organizations directly to inquire about their space availability.
We hope that you find the information in this handbook helpful as you navigate the policies and procedures governing student organizations at UW-Madison and within the College of Engineering.

The Student Organization Office also has an online handbook to assist student leaders in running campus organizations. For complete information on registration requirements, conduct and discipline, alcohol policy, organization development and other tricks of the trade, visit http://soo.studentorg.wisc.edu/handbook/08-09/handbook_home.html