# Student Organization Handbook



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## Welcome

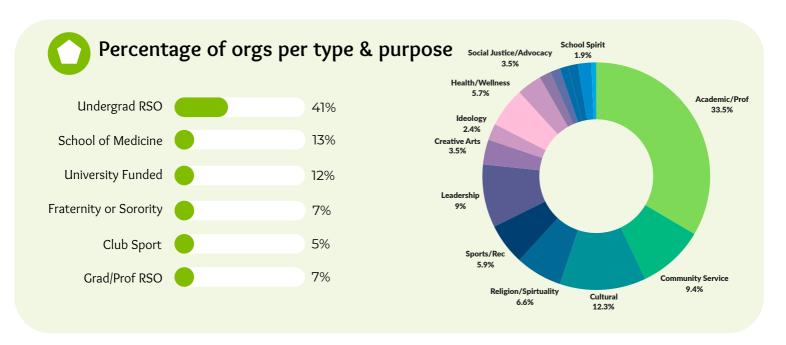
#### to the Student Organization Handbook

This handbook was created to serve as a resource for UAB student leaders interested in developing, participating in, or leading a student organization. UAB is home to student organizations that support a variety of interests. For a full listing of UAB organizations, visit Engage and view the *Organizations* tab. For more information or additional organizational support, contact The Office of Student Involvement and Leadership at getinvolved@uab.edu.

## ABOUT THE UAB Student Organization Community

**437** • **51** • **4,625** orgs new orgs events

#### DATA IS REFLECTIVE OF THE 2024-2025 ACADEMIC YEAR



## About

#### THE OFFICE OF STUDENT INVOLVEMENT & LEADERSHIP

Recognizing UAB students come from different backgrounds with varied interests and passions, the Office of Student Involvement & Leadership supports organizational development and management to meet students' diverse needs. Through engagement with students, Student Involvement & Leadership has the opportunity to support students as they progress academically, discover values, develop an identity and realize their full potential. This is achieved through advising students and student organizations, creating innovative leadership opportunities, promoting involvement in the campus community, and developing students' institutional pride. Student Involvement & Leadership values and encourages all forms of leadership to cultivate an inclusive, socially responsible, and vibrant campus community.



Mission

Student Involvement & Leadership exists to provide intentional experiences beyond the classroom that prepare UAB students to serve, inspire and lead.

Student Involvement & Leadership serves as the primary University department responsible for providing student leaders with the necessary support to develop, manage, and lead student organizations.

Org Support



### STUDENT ORGANIZATION REGISTRATION POLICY

Any group of students that meets regularly, elects officers, collects dues, or produces/sponsors a program, or functions in other ways consistent with the functions of an organization, is required to seek official UAB approval through the registration process. These groups must be recognized by the Division of Student Affairs to function as a student organization at UAB. Registration is a means by which student organizations may receive standard privileges granted when certain minimum requirements are met.



Student organizations should review the <u>UAB Student Organization Registration Policy</u> and share this policy with their membership.

#### This policy includes:

- Types of Student Organizations
- Criteria for Registration of Student Organizations/Privileges and Registration
- Criteria for Registration of Student Organizations
- Free Speech and Use of UAB Facilities
- Privileges of Being a Registered Student Organization
- Conditions of Maintaining Registration for Student Organizations
- Policy Violations

#### NEW ORGANIZATION REGISTRATION

#### **New Organization Registration Process**

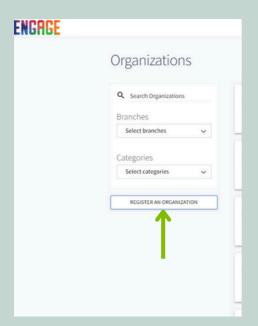
Registration for new organizations is available twice per year (July 1 – September 30 and December 1 – January 31). In order to form a new student organization on campus, an interest group must meet the criteria for registration and complete the following steps:

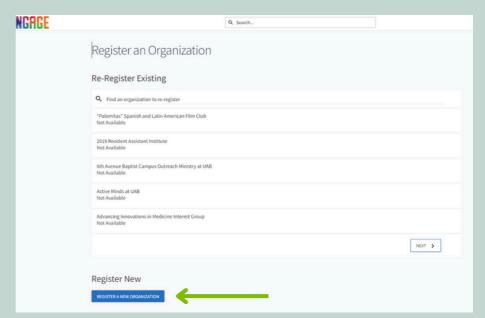


Login to <u>Engage</u> and go to the Organizations tab. At the bottom of the left column, click the button which states "Register An Organization".



A box will then appear prompting "Reregister Existing" or (scroll down) "Register New Organization." Select "Register New Organization."







#### Registration Link Visibility

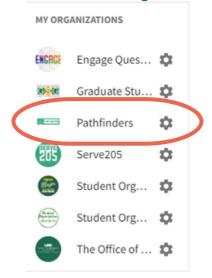
This option will not be visible unless accessed during an active registration period (July 1 - September 30 or December 1 - January 31).

The student organization registration application will be reviewed by the Office of Student Involvement and Leadership. Once the application is approved, the student organization will receive an e-mail notification. If there are any errors in the application, then the organization's registration will be denied. The organization will be notified of approval or denial by e-mail. The student which submitted the registration will have an opportunity to correct the errors and resubmit for consideration within the approved time frame for registrations. For an overview of the organization registration form, watch the tutorial above.

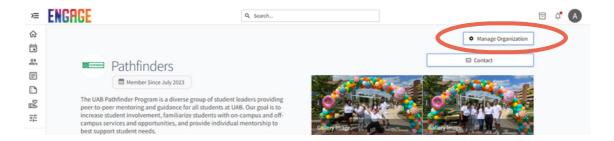
#### **RE-REGISTRATION PROCESS**

#### Re-Registration & Roster Update Process for Student Organizations

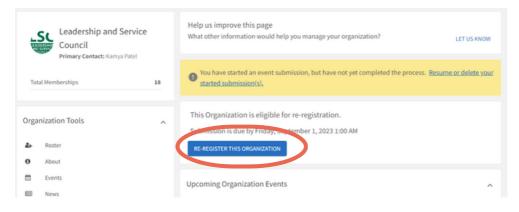
During an active period of reregistration, organization officers can use the "Manage" view to access reregistration. First, click the organization's box under the "My Organizations" section of the Engage home screen.



Then, select the "Manage Organization" button in the top right corner of the screen.



If the organization is eligible for re-registration, there will be a blue box which states, "RE-REGISTER THIS ORGANIZATION." Please click this to proceed to the renewal form.



#### INTEREST GROUPS

#### **Student Organization Interest Groups**

A student organization Interest Group designation is available for those students who are interested in creating a campus organization but may not meet the requirements for registering a student organization. This option allows for the students to recruit members, utilize limited resources, and have intentional support from the Office of Student Involvement and Leadership.

#### **Process**

#### 1. Submit an Interest Group Registration Form

Prospective organizations must submit an <u>Interest Group Registration Form</u> to notify the Office of Student Involvement and Leadership that the Interest Group will begin to recruit members with the intent of registering the organization.

#### 2. Meet with the Office of Student Involvement and Leadership

After completing the Interest Group Registration Form, the Office of Student Involvement and Leadership will contact the student who completed the form to schedule an Interest Group Consultation. During this meeting, the Interest Group will learn more about benefits of organizing and what will be required of them. This is also when the interest groups learn about the Engage platform.

#### <u>Responsibilities</u>

After one semester of promoting the Interest Group, Interest Groups should complete the New Organization Registration Process. Interest groups who do not meet the minimum requirements for New Organization Registration will lose recognition as an Interest Group.

Interest Group Registration forms may be filed once per academic year.

#### **Benefits**

Students that form an Interest Group and follow the required process will have access to the following benefits:

- 1. One space reservation during the semester of registration for the purpose of an interest meeting
- 2. One promotional table during the semester of registration for the purpose of recruiting members
- 3. 25 flyers printed for the purpose of marketing the organization

Interest Groups are required to meet with a UAB Pathfinder to schedule and reserve space and print flyers. To schedule an appointment with a Pathfinder, <u>click here.</u>

#### ORGANIZATION CONSTITUTION

#### Constitution, Purpose, Goals & Objectives

Student Organizations are required to create and maintain an organizational constitution that must be submitted through the registration process. The organization's constitution must include the current UAB Non-Discrimination Policy. Any organization that does not meet the criteria for constitution, goals, and objectives will be denied registration.

- The organization's constitution must include the UAB Non-Discrimination Policy: "The University of Alabama at Birmingham and (insert organization name) prohibits discrimination in admission, educational programs, and other student matters on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, age, national origin, disability unrelated to program performance, veteran status, or genetic or family medical history."
  - Student organizations that have filed and been approved for a Title IX exemption are permitted to retain their same-sex membership status.
     Organizations with Title IX exemptions should show both the full UAB Non-Discrimination Policy followed by their Title IX exemption.
- The purposes, policies, and objectives of an organization must not be in conflict or competition with the educational goals and functions of UAB. Registration may be denied to new student organizations' whose purpose is within the scope of a currently registered student organization.
- The organization may not a) have illegal goals and objectives; b) advocate
  or support the overthrow of the United States government; c) propose or
  participate in activities which would violate regulations of the Board of
  Trustees, UAB, or federal, state or local laws and regulations, or materially
  and substantially disrupt the word and discipline of UAB; or d) advocate
  enticement of imminent lawlessness which may produce such action
  referred to in "c" above.

#### ORGANIZATION ADVISOR

#### The Purpose of an Advisor

The advisor serves as a resource. By providing leadership, the advisor is an educator, helping students to learn by doing. The advisor provides a sense of direction for the organization and promotes student and faculty/staff interaction in, and out of, the classroom. Additionally, the advisor supports risk mitigation through on-going support of student leaders and through attendance at organization sponsored events when deemed necessary by the Office of Student Involvement and Leadership due to associated risks.

#### **Eligibility and Continued Service**

An advisor must be a full-time faculty or a staff member at the University of Alabama at Birmingham. Hospital personnel cannot serve as a registered student organization advisor. National headquarters, national organization staff, or paid campus ambassadors cannot serve in place of a faculty/staff advisor. Advisors are expected to be actively involved in the affairs of their organizations. Selection of a particular person as advisor is the choice of the organization and is by mutual agreement of both parties. After agreeing, the advisor must complete the Advisor Verification Form on Engage to make their role official. If the advisor plans to take a leave of absence, it is the responsibility of the organization to find a temporary replacement for the time in which the advisor will be absent. Each semester the student organization is responsible for connecting with their advisor to confirm their continued support.

#### **Expectations of an Advisor**

Annual completion of the <u>Advisor Verification Form</u>

- The Advisor Verification Form enables the Office of Student Involvement and Leadership to ensure that the selection and listing of an advisor on Engage is by mutual agreement. This form is completed during the fall reregistration period (available July 1 - August 30) or during the mandatory roster update period (available December 1 - January 30) of each year. Student organizations must communicate this need to their advisor.
- If the organization has a change in their advisor mid-year, the new advisor should complete the Advisor Verification Form and the organization should add the new advisor to their Engage roster.

#### ORGANIZATION ADVISOR

#### **Expectations of an Advisor**

- Attend (or find a faculty/staff proxy) for any student organization sponsored event or activity that's associated risk calls for additional support and supervision.
  - This requires advisors to be aware of and invited to organization events. This is the responsibility of the student organization. If the organization is planning an event requiring advisor attendance and the advisor is unavailable, the event will be denied without the confirmation of attendance by an advisor or advisor-identified proxy. The organization is made aware of which events require advisor attendance through the Engage event registration process. The Office of Student Involvement and Leadership will use the event registration "comments" feature to share any additional requirements, such as this. It is the organization's responsibility to communicate this need to the advisor in a timely fashion.
- Encouraged to meet regularly (at least once a month) with executive student leader(s) to provide an outlet for discussion of the leadership experience, offer guidance on organizational management, and drive alignment of activities with organizational objectives.
  - Student leaders should take the initiative to schedule these meetings. It is not the responsibility of the advisor to seek out the organization.
- Complete the Clery Center's Campus Security Authority training and uphold role as a Campus Security Authority and mandatory reporter.
  - Advisors will receive a notification from the UAB Learning System alerting them to the assignment, its due date, and instructions for completion. This training is typically assigned in October or November.
- Complete the Kognito At-Risk for Faculty and Staff training. Kognito
  (Suicide Prevention & Intervention training) provides advisors with tools to
  support conversations with students of concern, what to say, and how to
  assist with connecting them to the appropriate campus resources. Kognito
  training is available throughout the year, and advisors are expected to
  complete the training by October 30 of each academic year.

It is the <u>responsibility of the student leaders</u> to see that the advisor receives all minutes of meetings and is kept abreast of the program, upcoming events, and meetings. The Office of Student Involvement and Leadership staff serves in a general advisory role to organizations and advisors as need and particular questions arise.



#### **TRAININGS**

Student organization have the opportunity to partake in a number of trainings throughout the academic year. Required trainings for student organizations include the Fall and Spring Student Organization Summits.

#### Student Organization Summits \*

- The Student Organization Summits are semi-annual events hosted by the Office
  of Student Involvement & Leadership. The Summits are designed to support
  student organization leaders by connecting participants to UAB policies,
  guidelines, and resources relevant for organization success. The Summits are
  entirely online via Engage Organization Registration and have learning modules
  that include informative videos and follow-up questions.
  - All student organization presidents (or equivalent officer) <u>must</u> complete these web-based training courses. This includes officers in graduate and undergraduate RSOs, University Funded Organizations, and Fraternities & Sororities. While each president is required to complete the Summit, all organization members and advisors are encouraged to participate.

Failure to answer all Student Organization Summit questions will lead to a delay in your organization's registration being approved. If <u>all questions</u> are answered incorrectly, the organization's president will be required to meet one one with the Coordinator for Student Organizations.

#### Learn to Lead

- Learn to Lead presentations bring leadership development into UAB classrooms and student organization meetings with engaging and active presentations. The Learn to Lead leadership curriculum focuses on the Social Change Model of Leadership, including presentations which focus on individual, group, and societal values. Presentations can be modified to accommodate any class size and/or focus. Faculty, staff, and students are welcome to request presentations.
  - To request a Learn to Lead presentation, click <u>here</u>.
    - Requests should be submitted two weeks in advance.

<sup>\*</sup>Required trainings for student organizations.

#### **ORGANIZATION CONDUCT**

#### **Expectations of Student Organizations at UAB**

The <u>Student Conduct Code</u> ("Code") describes the standards of behavior for all students and student organizations and outlines students' rights and the process for adjudicating alleged violations. All students and student organizations are expected to conduct themselves in accordance with the Code. The current version of the Code, which may be revised periodically, is available from the <u>Office of Community Standards & Student Accountability</u> or online.

Student organizations that are campus branches of international/national organizations are not allowed to have an international/national, non-UAB student represent or advocate on behalf of the organization without an invitation from the University.

#### **How to Report a Violation**

To report a violation of the student conduct code, submit a <u>Student Conduct Code Alleged Violation Referral</u>. In the event of an emergency or crimes or incidents involving imminent threat of harm, contact UAB Police at 205–934–3535. If you are submitting an incident report related to gender discrimination, sexual harassment (including sexual misconduct and violence), or retaliation for reporting sexual harassment, please submit the report <u>online</u> to the Title IX Office. For additional information, contact Community Standards & Student Accountability at 205–975–9509 or visit their website.

#### **Violations**

Organizations which violate UAB regulations are subject to disciplinary action as outlined in the Student Conduct Code. Disciplinary action will be determined by the Office of Community Standards & Student Accountability in partnership with the Office of Student Involvement & Leadership. Such action may include, but not be limited to:

- Limitation of privileges
- Social probation for the organization
- Temporary suspension of the organization's events and activities
- Removal of active status of the organization
- Community service hours

Violations of the Student Organization Handbook and guidelines herein that do not align with Student Conduct Code policy but blatantly disregard student organization standards of behavior and reporting are determined by the Office of Student Involvement and Leadership. Failure to comply with student organization guidelines may result in loss of registration, mandated education, or other stipulations.

#### HAZING POLICY

It is the responsibility of all student organizations to encourage an atmosphere of learning, social responsibility, and respect for human dignity and to provide positive influence and constructive development for members and aspiring members. "Hazing" is an unproductive and hazardous custom that is incongruous with this responsibility and has no place in university life, either on, or off, campus.

1. Hazing – Engaging in any activity for the purpose of, among other things, initiation, admission into, affiliation with, or as a condition for continued membership in, an Organization that recklessly or intentionally harms or threatens or is intended to harm or threaten the mental or physical health or safety of an individual, or removes public or private property. Examples of hazing include, but are not limited to, unreasonable interference with a Student's academic performance; forced actions or inactions that demean or disgrace an individual; forced or coerced consumption of food, alcohol, drugs, or any other substance; forced or coerced actions that violate federal, state, or local law or the Code; forced or coerced wearing of inappropriate apparel; forced or coerced exclusion from social contact; creation of unnecessary fatigue (e.g., physical activity, deprivation of sleep); deprivation of food; any unnecessary physical contact (e.g., beating, paddling, forced exercises); personal servitude; unreasonable exposure to weather or the elements; or any other activity that could reasonably be viewed as subjecting others to embarrassment, degradation or humiliation. Silent participation, knowledge of, being in the presence of, or observation of hazing is not a neutral act; they are considered a violation of the hazing provision.

Hazing is prohibited and considered a violation of the Student Code. Attempts to engage in behavior prohibited by the Code or knowingly or willfully encouraging or assisting others to engage in these behaviors are also prohibited and may be adjudicated through the Conduct Procedures.



Student organizations should review the <a href="Student Conduct Code">Student Conduct Code</a> and refer to Section V.M. (Policy & Procedures Library - Policy VII-009).

### STATEMENT ON ALCOHOL & OTHER DRUGS

All registered student organizations should strive to promote a supportive and sustainable environment where their members thrive and flourish. The abuse and illegal use of alcohol or other drugs jeopardize the physical and mental wellbeing of the community by placing the health and safety of individuals at risk and undermining the University's mission. Therefore, all registered student organizations and their members are expected to act responsibly and in accordance with the law and University's Student Conduct Code.

All student organizations must abide by the institutional event and risk management policies regarding alcohol and other drugs. In addition to state and local laws as well as the Student Conduct Code, all student organizations that fall under an inter/national organization, must follow the event and risk management policies regarding alcohol and other drugs. These policies should include, but not be limited to:

- Use of organization funds for events including alcohol
- Distribution of alcohol
- Underage members
- Third Party Vendor Requirements
- Use of alcohol during recruitment, intake, or new member activities.

No alcohol shall be allowed at student organization community-wide functions. This includes involvement fairs.

#### **Relevant Policies:**

General Policy Regarding the Use and Consumption of Alcoholic Beverages

<u>Drug-Free Campus and Workplace Policy</u>

<u>Guidelines for Hosting Off Campus Events with Alcohol for Student Groups</u>

#### **EVENTS WITH ALCOHOL**

#### **University Compliance for Events with Alcohol**

The use of alcoholic beverages must be in compliance with federal, state and local laws; the regulations of the Alabama ABC Board; and other university policies and procedures, including, but not limited to, the Drug-Free Workplace Policy and the Drug-Free Campus Policy for Students.

All events where alcohol is present must end by 1:00 am. Alcohol may not be served or consumed for more than four (4) hours during any single event.

#### Responsible Persons

A "responsible person" must be designated for every function at which alcoholic beverages are served. That individual is responsible for ensuring that this policy and other related policies (see "Compliance") are followed. The organization's advisor must be in attendance for any event where alcohol is present.

#### **Controlled Areas**

Steps should be taken to ensure that alcoholic beverages are contained within the boundaries of the event. All alcoholic beverages should be consumed or disposed of by all guests or participants before they leave the premises.

#### **Event Advertisements**

Advertisements or invitations to events where alcoholic beverages are being served should emphasize the nature of the event and not alcoholic beverages.

#### **Self-Service**

Alcoholic beverages must not be freely available to attendees. A designated server or hired professional bartender must be on duty at the event to limit the size and number of drinks served. If the function involves a sit-down meal at which alcohol is served, waiters and/or waitresses should be instructed to ask before automatically refilling wine or liquor glasses.

#### **Proper Identification**

Alabama state law prohibits purchase, consumption or serving of beer, wine or distilled spirits by persons under legal drinking age. It is also a violation of Alabama state law to purchase alcohol for, or serve alcohol to, persons under the legal drinking age. Therefore, at all events where alcoholic beverages will be served, the designated server or hired professional bartender will be required to check for proper identification before serving any alcoholic beverages and must reject any questionable forms of identification. Alcoholic beverages may not be served at functions where the majority of attendees are under legal drinking age.

#### Non-Alcoholic Beverage Alternatives

Alternative non-alcoholic beverages must be equally available and accessible at all events where alcoholic beverages are served. Water should not be the only alternative beverage offered.

#### Food

Food must be made available to those in attendance at all events where alcoholic beverages are served.

#### **Hours of Service**

Service of alcoholic beverages must be discontinued at least one hour before an event is scheduled to end.

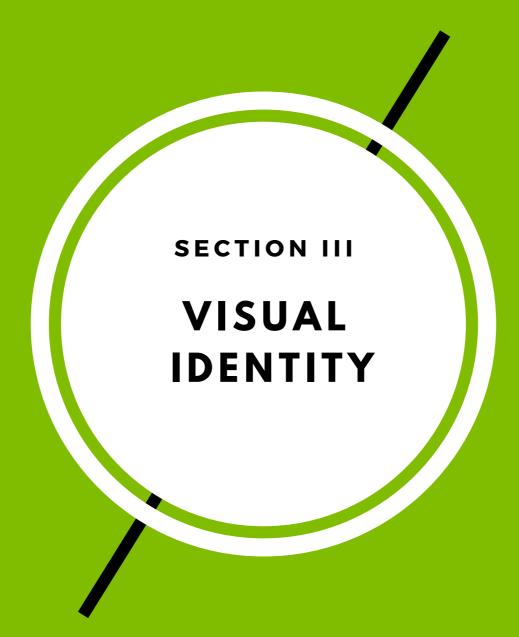
#### **Transportation**

For the duration of the event, the student organization must provide and have available transportation by taxi or other similar means for members/guests who are visibly intoxicated or who request transportation.

#### Refusal to Serve Intoxicated Guests

If a participant or guest at an event where alcoholic beverages are being served appears to have exceeded his or her consumption limit, the designated server or hired professional bartender must discontinue serving alcoholic beverages to this individual.

\*These guidelines were adopted and adapted from the <u>UAB General Policy Regarding the</u>
<u>Use and Consumption of Alcohol</u> and the <u>UAB School of Medicine's Guidelines for Hosting Off</u>
<u>Campus Events with Alcohol.</u>



#### VISUAL IDENTITY



## Student organizations should review the <u>Visual Identity Guide</u> and share this guide with their membership.

#### Marketing via Social Media

UAB welcomes individuals and organizations to identify their role at UAB publicly on social media. Be aware that by doing so, this is a representation of UAB and therefore is subject to UAB's conduct policies. Students are subject to the Academic Honor Code and Student Conduct Code. Individuals creating and maintaining digital mass communications or digital content ("content") are responsible for adherence to the following requirement:

- The name of the student organization posted publicly through social media outlets should match the name of the organization approved through Engage student organization registration.
- Content must not constitute a copyright or trademark infringement and must not otherwise violate any applicable laws or UAB policy (refer to the Visual Identity Guide).
- The only events that should be marketed through social media are those previously approved through the Engage event registration process.

Keep in mind these tips on accessibility when posting on social media:

- Is Alternative Text included for photos on Facebook, Instagram or Twitter?
- Do all graphics have a strong contrast between text and background?
- Was camel case used with the hashtags? #AccessibilityIsAwesome
- Is contact information available prominently in the social media bio?
- If a video is posted, are captions provided?

Student organizations should review Student Organizations on Social.

#### PROMOTION & ADVERTISING



## Student organizations should review the <u>UAB Student Organization</u> <u>Promotion & Advertising Policy</u> and share this policy with their membership.

#### All promotion and advertising materials must include the following information:

- Name of sponsoring student organization
- Contact information for sponsoring organization or individual
- Date of event/activity
- Time of event/activity
- Location of event/activity

**No Alcohol Promotion** 

Publicity and promotion of events where alcoholic beverages are being served should emphasize the nature of the event and not alcoholic beverages.

**No Sexual Connotations** 

Publicity having sexual connotations is prohibited.

**Flier Locations** 

Fliers and other publicity may only be placed in the designated locations identified for each campus facility. They may not be attached to interior walls, doors, windows, over-hangs, exterior walls, fences, utility poles, waste receptacles, signs, signposts, trees, or shrubbery.

**Copyright or Trademark** 

Organizations creating/maintaining digital mass communications or digital content are responsible for ensuring the content does not constitute a copyright or trademark infringement and must not otherwise violate any applicable laws or UAB policy. Display of banners on any academic building generally is not permitted. Any exceptions must be approved by the area responsible for that facility.

**Co-Sponsored Events** 

When an event is co-sponsored, the co-sponsorship must be clearly listed on all promotional materials.



#### **EVENT REGISTRATION POLICY**

#### Introduction

All student organizations in good standing have the privilege of hosting oncampus events. On-campus events must be registered with the University through the event registration process. Registration is the sole responsibility of the student organization(s) sponsoring the event.

The event registration guidelines assist students in the planning of safe and successful events and activities. These guidelines facilitate adherence to UAB's policies and procedures as well as state and local laws and regulations. The Office of Student Involvement and Leadership believes that students should drive the development of events. Student ownership of events should be guided by a set of best practices and policies to provide a level of consistency and to help build a culture of responsible hosting. **Organizations are required to register all on-campus and virtual events and activities through Engage.** Community service events may be submitted for marketing and recruitment purposes through BlazerPulse.



Student organizations should review the Student Organization Event Policy and share this policy with their membership.

#### This policy includes:

- Terms
- Events Requiring Security
- UAB Co-Sponsored Events
- Free Speech and Use of UAB Facilities
- Failure to comply

#### **EVENT REGISTRATION VIOLATIONS**

#### **Event Registration Violations**

Student Involvement and Leadership reviews all events with the goal of empowering and supporting student organizations to plan and offer events that are both fun and safe. University policies and procedures exist to assist students in managing events safely. Student Involvement and Leadership staff is available to assist organizations in effective event planning and management. If an event violates the Student Conduct Code or if any law enforcement agency issues an incident report, the matter will be referred to the Office of Community Standards & Student Accountability.

Any student group found not in compliance with the event registration guidelines or that is found to be operating an event in a manner that is inconsistent with the details provided in the event registration form will be required to meet with the appropriate advisor within the Office of Student Involvement and Leadership. Accountability could come in the form of the organization losing its privileges including, but not limited to, the ability to reserve space, rent equipment, request funds from USGA, etc. In addition to any disciplinary action by the university, organizations that are member organizations of either local or inter/national groups governed by inter/national organizations may also be subject to disciplinary action by those local or inter/national councils or groups for violations of these guidelines.

#### **IDENTIFYING RISK**

#### Identifying the Risk Level of an Event

Events inherently assume a certain level of risk. In an effort to support student organizations' risk mitigation processes, all campus events and activities must be submitted through the Engage event registration process a minimum of five business days prior to the event date. Events that are not submitted within the required window for review will be denied.

Identifying Risk – The safety and wellbeing of each UAB student alongside
the success and sustainability of each student organization is one of the
primary reasons the event registration process exists. There are five types
of risks associated to organization event planning. These five types of risk
have been adopted and adapted from Texas A&M's Division of Student
Affairs.

#### Physical Risks

This type of risk accounts for any physical harm that may be incurred by a participant. Factors associated to physical risk include but are not limited to the presence of food, alcohol, dangerous environmental conditions, recreational equipment, traffic congestion, etc. Organizations should actively consider harm reduction strategies to avoid physical risks.

#### Emotional Risks

 Emotional risks include those activities that could negatively influence the well-being of participants. Events that involve sensitive topics stimulate emotional risk.

#### Reputational Risks

It is important to consider the impact that the event may have on the reputation of each member (students must abide by the Conduct Code as a participant), but also the impact the event may have on the organization as a whole and UAB. Activities where participants may demonstrate poor conduct or where media may be present could influence the public's perception of UAB, the student organization, and the national organization when applicable.

#### Financial Risks

Organizations need to consider financial risks associated to hosting the event. Can the organization cover the cost of equipment rentals or catering, for example? In order for an organization to sustain, it is important to make wise financial decisions.

#### Facilities Risks

■ The space chosen for an event often dictates the type of activities that can be hosted. Is the space a safe environment? Does the facility approve of the type of activity the organization intends to host? Will traffic become an issue? What is the event capacity? How will the organization monitor capacity throughout the event?

#### **RISK REVIEW**

#### **UAB Risk Review Team**

The Office of Student Involvement & Leadership does not in its sole discretion determine which student organization hosted events require security or other University-guided risk mitigation. The UAB Risk Review Team (composed of representatives from Student Affairs, Marketing & Communications, the relevant campus building manager, and UABPD) meet regularly to collectively review events that meet certain risk criteria resulting in additional consideration. Student Involvement & Leadership serves as the liaison between the Risk Review Team and the student organization event host. Student Involvement & Leadership communicates any shared outcomes regarding additional measures for organizational and participant safety to the student organization following the meeting.

#### **Event Review Criteria**

Through the Engage event registration process, the Office of Student Involvement & Leadership identifies criterion associated to the time, place, and manner of the event that warrant additional consideration.

### **EVENTS WITH FOOD & VIRTUAL EVENTS**

#### **Events with Food**

Food that is handled or prepared improperly can cause food-borne illness. Safety in food preparation and service is important to consider when planning an event or promotional tabling activity. Furthermore, the possibility of allergic reactions create risk associated to food distribution. Food should be labeled and prepared by a caterer or pre-packaged to mitigate risks.

UAB has its own catering company, <u>Blazer Catering Co.</u>, which offers a low cost Student Catering Menu. If the event is located in the Hill Student Center (including the Amphitheater), the organization is required to use Blazer Catering Co. or submit the <u>exemption form</u>.

**Violations to the Catering Policy** 

Violations to the Hill Student Center catering policy will result in the loss of HSC space reservation privileges.

Contact Information:
Elizabeth Murdock | Catering Director
elizabeth.murdockesodexo.com
Phone: 205-996-6568

Virtual Events

Student organizations can sponsor and promote virtual events. Through the Engage event registration process, organizations can indicate the location as "online" which will prompt the inclusion of an accessible link for participation.

All virtual events should be submitted through the Engage event registration process.

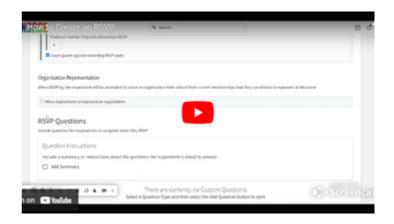
#### **EVENT MANAGEMENT**



There are several features that organizations can utilize to track attendance and gather feedback. The videos below provide an overview of three Engage tools for event management. Click on the video titile to open the video in a new window.

#### **How to Create an RSVP**

It may be useful to know who expects to attend an event. The Engage RSVP feature allows orgs to set capacity limits, ask unique questions, and have the email addresses for those planning to attend.



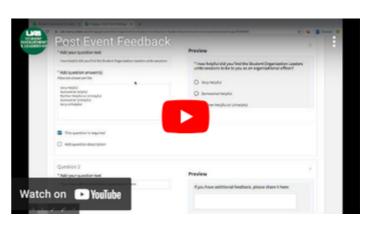
#### Track Virtual Event Participation

If you're hosting a Zoom meeting, drop in the Engage provided link to have users login. By logging in using this unique link, Engage adds the user to the list of "attended" participants.



#### **Create a Post-Event Survey**

Want to gather feedback from your event? When creating the event submission, orgs can create post-event questions which will automatically distribute to any user that is marked as attended.



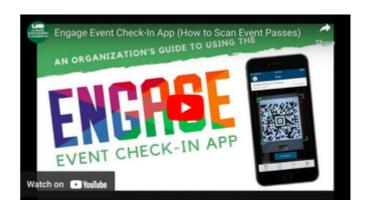
#### **EVENT MANAGEMENT**



There are several features that organizations can utilize to track attendance and gather feedback. The videos below provide an overview of three Engage tools for event management. Click on the video title to open in a new window.

#### **Event Check-In App (for orgs)**

It may be useful to know who expects to attend an event. The Engage RSVP feature allows orgs to set capacity limits, ask unique questions, and have the email addresses for those planning to attend.



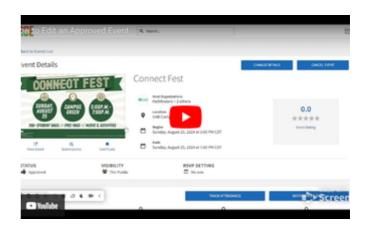
#### How to Use the Event Pass

The Engage Event Pass allows student organizations to track event participants. This video shows a participant how to download their event pass. This video can be shared with future event attendees.



#### **Edit an Approved Engage Ever**

Do you need to make an update an approved event? This tutorial will be a step-by-step guide for organizations that need to chan their event's details. Please note any change will push the event back through the event registrat process.



#### **EVENT MANAGEMENT**



#### **Showing Films at an Event**

Has the organization obtained a public performance license for copyrighted materials? For more information on Copyright Compliance, please visit <a href="https://www.swank.com/public-libraries/copyright/">https://www.swank.com/public-libraries/copyright/</a>.



#### **Events with Minors**

Because the organization's event includes participation from minors, it is the organization's responsibility to read and comply with the UAB policy on the Protection of Children on UAB Premises and in UAB-Sponsored Activities.



#### Events Promoting International Travel

UAB student organizations that have interest or an intent to travel abroad are required to meet with <u>UAB Education Abroad</u>, PRIOR TO any planning or confirmation of travel details. Failure to do so could result in the removal of registered student organization status.

## EVENT REGISTRATION

#### **EVENT REGISTRATION PROCESS**

#### **Submission Timeline**

All on-campus organization events and activities must be registered with the Office of Student Involvement and Leadership on Engage **five (5) business days before the event**. Virtual events must be registered a minimum of two (2) business days before the event. This is to allow for the review and evaluation of the event by staff.

Events that are not registered within the required timeframe for review will be denied, regardless of the amount of money the group has already invested in the event.

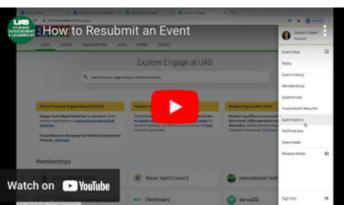
#### **Review & Feedback of Submitted Events**

The Office of Student Involvement and Leadership will provide feedback through the discussion section of the event registration form to allow students to amend their existing registration to meet criteria. Any issues or questions about an event will be communicated on Engage through the discussion feature. It is the organization's responsibility to respond to questions using this feature. The student that submitted the registration form will receive an email notification from Engage when discussion threads are posted.

- Events that are not updated to reflect the recommendations made through comments and do not meet standard criteria for event registration will be denied. Any event that is denied through event registration will be considered cancelled and not permitted to take place. If an event is denied, the Office of Student Involvement and Leadership will notify the campus facility to cancel the space reservation.
- If the organization wishes to resubmit a denied event after making updates to the original submission, they may do so. However, the new submission must be a minimum of 5 business days prior to the date of the event. Denied submissions may be updated and resubmitted through a user's Engage profile.
- Student Organizations are responsible for ensuring that the event has been approved through the appropriate channels (including but not limited to catering, facility reservation, etc.). Space reservations should happen concurrently with event registration.

 When using the Create Event option, please note, submission DOES NOT GUARANTEE approval. All events are reviewed by the Office of Student Involvement and Leadership.

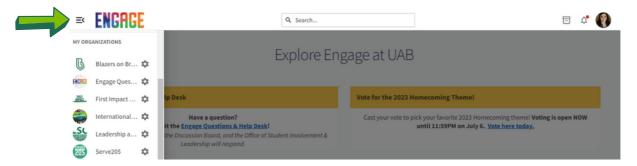




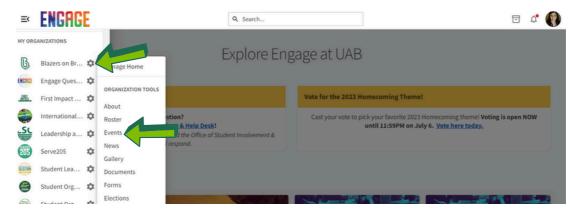
#### **HOW TO SUBMIT EVENTS**

#### **How to Submit Event Registration**

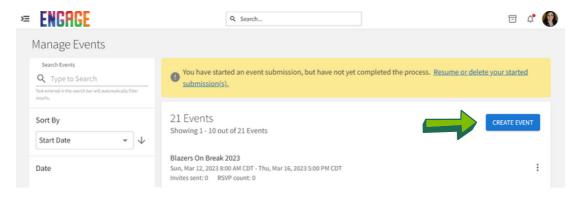
The member must have officer access to submit events for review. Positions with access will be able to do so by managing their organization. First, using the drop down menu on the Engage home screen, select your organization.



Click the tool icon to the right of your organization's name and from that drop-down menu, select "Events"



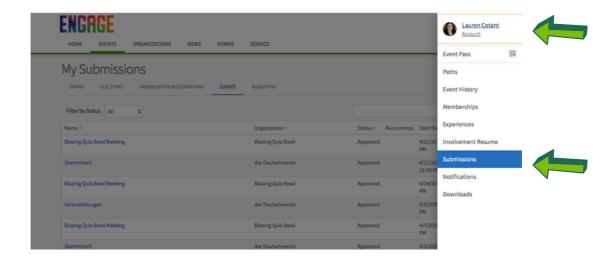
On the Manage Events page, click the blue Create Event button.



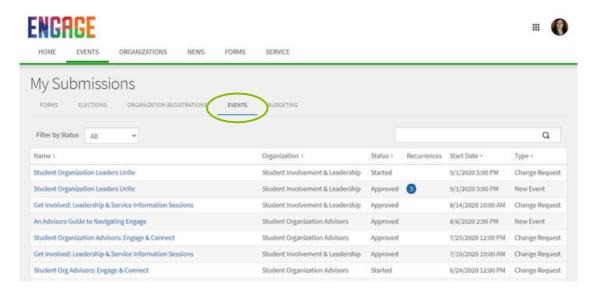
#### **NAVIGATING TO SUBMITTED EVENTS**

#### Viewing the Submission from your User Drawer

This method is only possible if you were the creator of an event. After clicking on your initial or photo in the upper right corner, select Submissions.



Then click on the Events tab. From here, you can click on the title of any event submission to view the details and forms submissions associated with it.

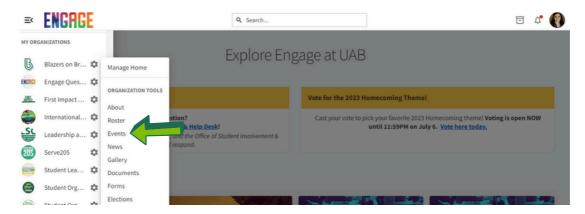


Click on the page you would like to view or click on the first page of your event submission, after which you can use the Previous and Next buttons to go back or advance through the pages of the submission. You can also modify denied event submissions from this section, make edits and resubmit. If you did not complete an event submission, you can also continue that submission from this area.

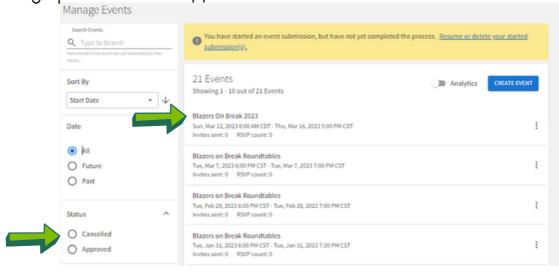
#### **NAVIGATING TO SUBMITTED EVENTS**

#### Viewing the Submission of an Approved Event from the Org Account

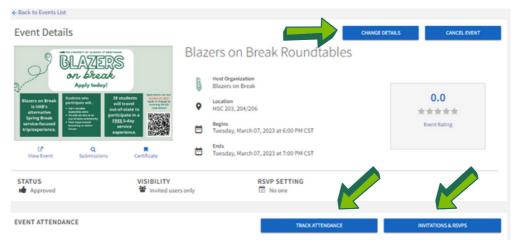
You can view an approved or cancelled event's details if you are an officer with Events management access in the organization the event was created in. Navigate to the Manage view for your organization and use your organization tool menu to switch to the Events tab.



From there, you can click on the name of the event to manage it or use the filtering options to view "Approved" or "Cancelled" events.



Once you click an approved event, you can change details (will resubmit for review & approval), track attendance, & manage RSVPs.



## SECTION V SPACE RESERVATIONS

Active student organizations who are in good standing with the University have access to reserve campus facilities for the purposes of organizational management/promotion and organization-sponsored events. Use of space is a privilege; organizations that do not abide by the Event Registration Guidelines set for student organizations as well as the space reservation policies defined by the venue, will be referred to the Office of Student Involvement & Leadership and/or Student Conduct. Privileges will be revoked for organizations that abuse this benefit. Student organizations are required to register all on-campus events (this includes tabling and regularly scheduled meetings) through the University's online involvement platform, Engage.

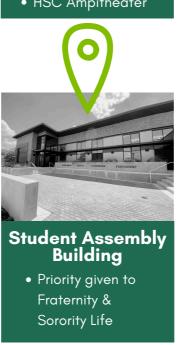
Space reservation does not replace event registration through Engage.

The following campus facilities may be reserved by student organizations:













#### **HSC Space**

- Hill Student Center
- Mini-Park
- HSC Ampitheater



#### Space confirmation

Failure to submit Engage Event Registration will result in the loss of your previously reserved Hill Student Center space.

Organizations should reserve HSC space, then register the event. The HSC staff will confirm your space reservation through the Engage event registration process.

#### HILL STUDENT CENTER

Space reservations open for student organizations:

- 1st Tuesday of October for the following Spring/Summer semester
- 1st Tuesday of March for the following Fall semester

Requests should be submitted to the Hill Student Center's online space reservation system on or following the open of reservations for that term. Student organizations are required to submit their space reservation concurrently with their event registration. Both should be submitted a minimum of 5 business days in advance.

To review the Hill Student Center's building hours, <u>click here</u>.

During the following University designated holidays and breaks the Hill Student Center may be closed:

- Labor Day Weekend
- Thanksgiving Weekend (Wednesday-Sunday)
- December 23th-27th
- New Year's Eve and New Year's Day
- Martin Luther King Jr. Day
- Martin L. King Day
- Memorial Day Weekend
- Juneteenth
- Independence Day

For a comprehensive list of rules and regulations for the Hill Student Center, please <u>click here</u>.

To review available meeting space and to request a space, click here.

#### **ACADEMIC SPACE**

Academic space reservations for student organizations are requested through the Engage event registration process. However, student organizations can access academic space guidelines and policies through www.uab.edu/bookit.

The Office of the Registrar reserves the following spaces for student organizations:

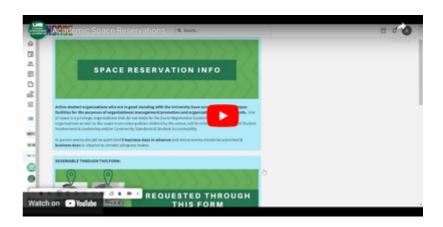
- Campbell Hall
- Heritage Hall
- University Hall

Space reservations for academic space will be made through the student organization event registration process.



#### **Registration Process**





Academic space is only available to student organizations following the University's academic add/drop period. Each semester, the Office of Student Involvement & Leadership in coordination with the Office of the Registrar will determine the exact dates organizations can access academic space. This will always be outlined in the Event Registration Form.

#### NOTE:

Academic space opens to student organizations for the Fall and Spring semesters the week after that semester's academic Add/Drop deadline. Student organizations may request the use of space prior to that time, but requests will be left pending until one week after the Add/Drop deadline. Space requests made for event dates prior to the Add/Drop timeline will be denied.



#### UNIVERSITY RECREATION



#### **University Rec**

- U-Rec Center
- Intramural Fields

Space reservations for University Recreation facilities can be made directly on the <u>University Recreation website</u>.

Student organizations are required to submit their space reservation concurrently with their event registration. Both should be submitted a minimum of 5 business days in advance. Any facility reservation that does not have a corresponding event registration will not be approved. For a comprehensive list of policies and procedures visit the <u>University Recreation</u> Facilities website.



#### **Space confirmation**

Failure to submit Engage Event Registration will result in the loss of your previously reserved University Recreation space.

Organizations should reserve space, then register the event. The URec staff will confirm your space reservation through the Engage event registration process.



HOUSING & RESIDENCE LIFE

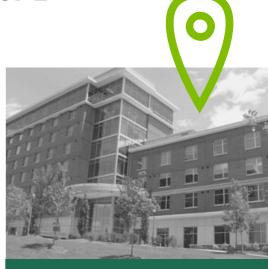
Student Housing & Residence Life has first priority over all spaces within the Student Housing community. In order to use Housing & Residence Life space, the event must be 1. open to all students, 2. co-sponsored by Student Housing, or 3. fall into one of the three residential curriculum areas and have residential members present at the event.

Student organizations and Departments can submit requests as early as 2 weeks before the event. No organization or outside Department events will be allowed during midterms, the weekend before/week of finals, and the first weekend/week of school.

#### **Registration Process**

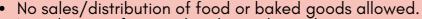
Student Housing & Residence Life space is requested through the Engage event registration process.

- Once the registration form has been submitted, it will be reviewed by the H&RL and an appropriate space will be identified and confirmed, if there is one available.
  - Events must be open to residents.
  - Requests cannot be submitted more than two weeks prior to the date of the event.
  - On-going organization meetings <u>are</u> not allowed.



#### Housing & Res Life

- Blazer RLC (lower level)
- Gold Hall: Cahaba Rooms
- Gold Hall: Steel City
- Gold Hall: Underground
- McMahon Hall: Magnolia
- McMahon: The Vault
- McMahon: Huddle Room
- McMahon: Study Rooms (4)
- Rast/Blount Lawn
- Tabling in Lobbies: Blazer,
   Blount, Denman, Camp,
   Gold, McMahon, and Rast



- No admission fee may be charged, nor donation requested for any activity taking place in these spaces.
- No ongoing meetings or rehearsals will be allowed in the space.
- No clear tape may be used on any surface. Blue Painter's Tape is the only adhesive allowed.
- No Painting is allowed in any space.



#### STUDENT ASSEMBLY BUILDING



#### **Student Assembly Building**

The Student Assembly Building is a dedicated space for the gathering and engagement of student organizations with an emphasis on fraternity and sorority life. The Student Assembly Building is a single-story facility with 8 multi-purpose rooms for meetings, events, and community building. All student organizations who are registered with the University and in good standing will be permitted to reserve space in the building, but priority will be given to UAB's recognized fraternities and sororities. If a space is not being utilized 10 days out from an event, any registered student organization may reserve that space.

#### **Building Hours**

The hours for the Student Assembly Building are as follows:

- Sunday 2:00 PM 9:00 PM
- Monday 12:00 PM 9:00 PM
- Tuesday 12:00 PM 9:00 PM
- Wednesday 12:00 PM 9:00 PM
- Thursday 12:00 PM 9:00 PM
- Friday 12:00 PM 5:00 PM
- Saturday CLOSED

#### **Space Requests**

Requests should be submitted through the online reservation system linked <u>here</u>. All student organizations, including social fraternities and sororities are required to submit their space reservation concurrently with their event registration. Both should be submitted a minimum of 5 business days in advance. To see a list of available spaces, click <u>here</u>.



#### OTHER CAMPUS LOCATIONS

Student organizations may have access to other locations not listed in the Student Organization Handbook. If the organization identifies an alternative space, then the organization is responsible for ensuring that space has been reserved. Engage event registration provides space reservation capability for three academic buildings (Heritage, University, and Campbell). Organizations that host activities in academic space other than the above mentioned may do so if they receive special permission from the building administrator. Engage, the Office of Student Involvement and Leadership, and the Registrar's Office do not support academic space reservations outside of Education, Heritage, University, or Campbell. If the organization has received alternative permission to host this event in another academic space, they are still required to submit the event through Engage and indicate that within the submission.

#### **UAB Libraries**

Study rooms within Lister Hill and Sterne Library are available by reservation to both individuals and groups of two or more. Space reservations for study rooms should be made directly with the library through their online room reservation form. For an overview of the space reservation process for Sterne Library and Lister Hill, please reference their <u>Space Reservation Policy</u>. Individuals or groups who are reserving study space in the libraries for academic preparation do not need to complete the event registration process. Event registration is for the use of student organizations hosting organization sponsored events.

#### **Special Events**

For special events, student organizations may utilize one or more of the following venues:

- Alys Stephens Center -
  - To reserve space in the Alys Stephens Center, call the administrative office at (205) 975-9540.
- National Alumni House -
  - Any use of the UAB Alumni House must be scheduled through the Alumni Affairs Office (205) 934–3555. Students can reference the National Alumni Society's Rental Policies and Procedures for a comprehensive list of policies for the space.

These venues are able to be reserved by student organizations, and all come with an associated cost. Please reach out directly to the venue in order to check availability, pricing, as well as the policies and procedures for the space.



#### **FUNDRAISING**

**Fundraising** 

Within this Handbook, fundraising is defined as the process of soliciting financial support to fund organization operations and philanthropic contributions on behalf of the organization. Registered student organizations may conduct fundraisers throughout the year providing all University and Alabama state laws are followed. Prior to collecting money or fundraising, student organizations must register their fundraiser through the University's Event Registration process on Engage. The following guidance should be followed when planning and implementing fundraisers.

- Fundraisers may not be conducted for the sole private gain of individuals or for-profit businesses.
- Student organizations may not conduct fundraising on behalf of or for the benefit of a non-University recognized organization or corporation, unless the beneficiary is a charitable, non-profit organization.
- A student organization may charge an admission fee to a program as a form of fundraising. (Please note: there may be a facility fee charged to the student organization if there's an entry fee for an event taking place in the Hill Student Center)
- Proceeds from fundraising activities are subject to state sales tax laws in the instance the organization does not meet one or more of the State's exemption requirements.
- Due to the potential for food-borne illness and improper food handling, student organizations are not allowed to sell food that has been prepared by members of the organization as an organization fundraiser.

#### LETTER OF REGISTRATION

#### Official Letter of Registration

If a student organization would like to set up a bank account, the bank will require an Official Letter of Registration. The student organization letter is issued on an annual basis and includes the name and contact information of the members the organization deems needed for bank access. This is verified by the upload of organization meeting minutes which include these details. The faculty/staff advisor must also have bank access. This letter indicates the organization as a registered organization that is in good standing with the University and the Office of Student Involvement and Leadership.



Complete the <u>Official Letter of Registration Form</u> to request a letter. Be prepared to upload meeting minutes including the organization's EIN number as well as officers and faculty/staff advisor that need account access. Organizations must also indicate their preferred bank. The Office of Student Involvement and Leadership requires 5 days to review and write the Official Letter of Registration.

#### HOW TO OPEN A BANK ACCOUNT



#### How to Open a Bank Account

Any student group that will raise money and, therefore, spend money, will need to maintain proper financial accounts for the group. These accounts should not be the same as any individual's account and should be set up under the organization's name. This will allow the organization to securely collect and store money, use a debit card for organization purchases, and deposit reimbursement checks. An organization must have an EIN to secure a bank account.

- Host an organization meeting with officers to discuss opening a bank account.
  - Draft Meeting Minutes which details that the organization wants to open a bank account with "said bank," who will be on the account, their official titles, and the organization's EIN number.
    - Everyone who is officially on the account must be present when opening the bank account
    - When transitioning leadership, the current account holder and the new account holder must visit the bank.
    - UAB suggests opening an account with either Regions Bank or BBVA Compass based on positive past experiences. However, organizations may open a bank account with the bank of their choice.
- Print or make a copy of the organization's CP575 Confirmation form (EIN verification)
- Fill out the <u>Official Letter of Registration Form</u> on Engage. The student that made the request will receive the letter as an attachment to the form submission.
- If the organization is part of a national chapter, it may request Tax Identification Documents from the national organization, such as 501(c)(3) confirmation showing that the organization is a non-profit and is tax exempt.
- Take the Meeting Minutes, CP575 Confirmation, Official Letter of Registration, and Opening Deposit to the bank along with the starting deposit.
  - Regions requires a \$100 deposit.

#### TAX ID

#### Tax ID / EIN

Any student group that will raise money and, therefore, spend money, will need to maintain proper financial accounts for the group. These accounts should not be the same as any one individual's account and should be set up by applying for a Tax ID (called EIN by the IRS) specific to the group. Each taxpayer, or Student Organization, must have a Federal Taxpayer Identification Number (EIN). The organization should file Form SS-4 with the IRS to apply for this number. Any financial accounts created or maintained for the organization should be managed under this number.

#### **EIN & W9 Must Match**

The person applying online must have a valid Taxpayer Identification Number (SSN, ITIN, EIN). The organization is limited to one EIN per responsible party per day. Organizations may reapply for a new EIN from year-to-year if needed; there is no penalty.

The "responsible party" is the person who ultimately owns or controls the entity or who exercises ultimate effective control over the entity. Unless the applicant is a government entity, the responsible party must be an individual (i.e., a natural person), not an entity.

The individual who applies for the EIN will need to sign on the W9s for the student organization's reimbursement requests. In order to prevent a RSO from applying for a new EIN every year, it is recommended that the RSO seek the support of the faculty/staff advisor.

#### Instructions for Obtaining an EIN

- Apply for an Employer Identification Number (EIN) online
- Read instructions and click on "Apply Online Now"
- Read instructions and click on "Begin Application"
- Scroll to bottom of list and select on "View Additional Types including Nonprofit/Tax- Exempt Organizations," click "Continue"
- Choose either "Community or Volunteer Group" or "Social or Savings Club" depending on which best describes the group, click "Continue"
- Read description to confirm selection, click "Continue"
- Fill out the rest of the required information and submit

If the above steps are followed properly, the EIN will be generated online and provided in a PDF document for immediate use. Print out and retain a copy of the CP575 Confirmation. Current and future officers will need this document for tax filing purposes.

#### **EXEMPTION STATUS**

#### **Tax Exemption Status**

Registration of a student organization does not make the organization tax exempt. UAB's federal taxpayer identification number may not be used by organizations that are not University Funded Organizations.

#### **Obtaining Exempt Status**

Social clubs may be exempt from federal income taxation if they meet the requirements of section 501(c)(7) of the Internal Revenue Code. Although they are generally exempt from tax, social clubs are subject to tax on their unrelated business income, which includes income from non-members. For more information, visit the IRS website.

#### **USGA FINANCES**

#### **Undergraduate Student Government Association Funding**

Undergraduate student organizations are eligible to submit a funding request to USGA if the organization meets the following requirements:

- Is registered with the University
- Obtains an active bank account
- Obtains an active iSupplier account

Beginning Fall 2024, it is required that two student leaders from each organization attend one of the budget information sessions and one person attend our budget hearing sessions which are held on Zoom.

A student organization can submit a budget request during the budget request week. No extensions will be given to submit a budget request. In order to request funding from USGA, the USGA Budget Process on Engage must be completed.

#### **USGA RSO Affiliate Application**

Beginning Spring 2023, RSO funding will be provided under an allocation model. To become an affiliate, please fill out the USGA RSO Affiliate Application on the USGA Engage Page. Important deadlines regarding the budget will be sent to the affiliates each semester through email and Engage. The allocation model allows for all allocated funds for each semester to be deposited in the RSO bank account at the beginning of the semester. RSOs will be required to submit an end-of-semester report with all Engage event confirmations and receipts to verify use of funds. More information and guides on filling out these forms can be found on USGA's Engage page under Documents.

For any questions or concerns, please contact USGA Vice President of Finance, Vinayasri Vanteru (vvanteru@uab.edu)

#### **USGA FINANCES**

#### **USGA Budget Request Process**

- Budget Requests can be made using the organization's Finance tab on Engage by clicking on the 9-dot square next to the user's profile picture. Select the organization and open the three line menu at the top left. Click Finance and under Create Request, select Create Budget Request.
- Budgets for the Fall semesters are approved in the Spring semester prior, and budgets for the Spring semester are approved in the Fall semester prior.
  - o For organizations that were newly registered after the budget deadline or were inactive at that time, USGA offers up to \$100 in funding through the RSO Support Initiative. To be eligible, the organization must be a registered affiliate. The application form for the RSO Support Initiative can be found on USGA's Engage page.
  - The RSO Support Initiative will be supported under a reimbursement model. Orgs must have an active organization bank account, W-9 form, and iSupplier to be eligible to receive funding. Please refer to the reimbursement guide on Engage for more information.

Within 48 hours of submitting a budget request, an email will be sent to the individual who submitted the request. Sign up for a budget hearing time using link in the email. Please be mindful of the following:

- Failure to schedule a budget hearing will result in an automatic denial
- Failure to attend the budget hearing result in an automatic denial
- Failure to arrive on time to the budget hearing will result in an automatic decrease in funding
- Approved amounts may differ from requested amounts
- Fundraisers and events that are unique to the organization are more likely to be approved for funding as well as receive more funding. Meetings that only benefit a small group of students are less likely to be approved for funding.
- USGA will not fund items such as pins, certificates, and name tags that solely benefit specific members of an organization.

#### **GRADUATE STUDENT GOVERNMENT FINANCES**

#### **Graduate Student Government Funding**

The GSG funding application is due on the first day of class during the Fall and Spring semesters, as per the UAB Academic Calendar. Application will be open for at least 2 weeks before the first day of class during each funding cycle. Please keep an eye on the GSG website and social media pages for the announcement.

The application named "GSG Funding Application for Graduate Student Orgs" must be submitted online on the Engage platform.

#### **Section A: Eligibility**

Any student organization requesting funds from the Graduate Student Government must:

- Be an organization that provides professional development opportunities, educational support, mental health initiatives, and social activities primarily for Graduate Students supported by the GSG constitution.
- Be registered with the University through <u>Engage</u> during the semester when the organization requests the funds and plans to use the funds.
- Have an active GSO bank account and <u>UAB iSupplier</u> account. GSG and Graduate School cannot reimburse purchases made by individual student bank accounts/debit cards/credit cards.

#### Section B: Requirements

- Organizations must be in good standing with GSG and the university.
- Organizations must adhere to GSG's Funding Policies and UAB's Expenditure Guidelines.
- Organizations must submit monthly bank statements to the GSG treasurer and budget committee liaison.
- Maintain a member's directory with member name, program name, email, and phone numbers.
- Maintain an annual account balance report and submit it to the GSG with their funding application.
- Maintain invoices for every transaction and submit them with the account balance report.

#### Section C: GSG Funding Application and Allocation

- The Budget Committee will meet at the end of the first week of class and notify the GSOs of the approved funding amount within two weeks from the first day of class.
- If a GSO misses the application deadline, the Treasurer can accept the funding request application or extend the deadline, given the funding availability.
- Funding history: The Treasurer shall rank GSOs based on funding history with GSG. The GSOs with a score of 80 or more, according to the GSG funding scoring system, shall be ranked higher for funding allocation (Section E).

#### **GRADUATE STUDENT GOVERNMENT FINANCES**

Questions should be directed to the GSG Treasurer.

GSG Treasurer: Isis Thomas (<u>i</u>sist@uab.edu)

UAB Financial Affairs policies can and do change.

For information about specific policies visit the <u>UAB Financial affairs webpage</u>.

#### **Co-Sponsored Events with GSG**

For events which your organization will be co-sponsoring with GSG using GSG allocated funds, notify the GSG Treasurer and the Graduate School by email, indicating which GSG committee the organization will be partnering with and how much your organization will be contributing.

- If the organization will be contributing a lump sum amount (i.e. \$200) towards an event, no other actions need to be taken(i.e. uploading receipts or invoices need to be done).
   The GSG committee co-sponsoring the event will be responsible for submitting invoices for payment. The GSG Treasurer and Graduate School will make the necessary adjustment to your GSG account.
- If the organization will be responsible for a specific invoice, for example catering, follow
  the reimbursement guidelines as usual. <u>Invoices should only be uploaded for payment to
  the GSG website only once.</u>

#### GRADUATE STUDENT GOVERNMENT FINANCES

#### Co-Sponsoring and Other GSG Funded Student Groups

For events which the organization will be co-sponsoring with another student group using GSG allocated funds, notify the GSG Treasurer and the Graduate School by email indicating which Student group your organization will be partnering with and how much you organization will be contributing. The GSG Treasurer and Graduate School will make the necessary adjustment to your organization's GSG account.

Invoices should only be uploaded for payment to the GSG website only once. Arrangements between co-sponsoring organizations must be made as to who will be responsible for submitting documentation for payments.

#### **Required Documentation**

- Completed GSG Reimbursement Form
- Agenda for meeting OR Poster for event with date, time, and place of meeting/event
  - Posters/flyers must include GSG Logo no less than 1% of the poster space.
  - Emails communication must include "funded by GSG".
  - Posters/flyer/emails also must contain the following statement: "To request special disability related accommodations, please contact [insert the organization's email address]"
- Sign-in list with ALL attendees listed
- List does not need to be hand-written signatures
- Itemized original receipt listing the food, beverages, and supplies purchased
- Receipts should include the method of payment
- Include documentation to link the receipt to the method of payment (i.e. screenshot of credit card statement, image of credit card with name and last four digits visible)

#### **Submission of Documentation for Payment**

Completed reimbursement forms should be scanned and uploaded directly to the GSG website under "GSG Event Payment Request."

#### **Timing**

Reimbursements requests should be prepared immediately following each meeting and event. Payments to vendors generally take about 2-3 weeks to process and any delay on behalf of a student group looks poorly upon the University as well as the GSG. Significant delays in reimbursing will be noted by the Treasurer and will be a factor in obtaining funding in subsequent years. It is extremely important to the University as well as the GSG that we maintain a good working relationship with vendors who are gracious enough to allow for invoicing.



# SAMPLE CONSTITUTION

#### SAMPLE

Constitution & Bylaws

The constitution and bylaws guide an organization in its operations and activities and, accordingly, are intended primarily for the organization's benefit and use. The constitution contains the fundamental principles and structure of the organization, and the bylaws outline the basic rules of procedure by which a group's membership govern their organization.

The constitution and bylaws should be carefully formulated, clearly worded, and kept up-to-date so that the needs of the organization can be met. Furthermore, it is important that each member of an organization have a copy of the constitution and bylaws.

The following outline is provided to assist in the preparation of a constitution and, if needed, bylaws. Use this guide to prepare the constitution for a new student organization or to revise and update a current constitution. A copy of the constitution is required to be submitted via Engage in order to approve an organization.

#### CONSTITUTION

The constitution should be simple yet comprehensive and difficult to amend, leaving any specific procedural rules to be included in the bylaws. When amending the constitution, as with the bylaws, previous notice of any proposed changes are usually required to be given to the membership and should not be changed in the same meeting in which proposed.

#### **BYLAWS**

Bylaws contain the standing (permanent) rules of procedure of an organization. Items in the bylaws may be covered in appropriate detail in the constitution of very small organizations. However, most groups keep the two separate because bylaws usually contain more detail and are subject to change more than that of the constitution and, therefore, may require different procedures for amending. Provision for amendment of the bylaws should be somewhat easier than that of the constitution as rules of procedure should adapt to changing conditions of the student organization. When amending the bylaws, as with the constitution, previous notice of any changes are usually required to be given to the membership and should not be changed in the same meeting in which proposed. Bylaws are more permanent, however, than passing a general motion, which may require only a simple majority vote of voters present at a general meeting of the membership (a quorum being present). Bylaws cannot run contrary to the constitution.



## ORGANIZATION NAME DATE OF UPDATE CONSTITUTION

#### Article I -

#### Name, Purpose, Non-Discrimination Policy, and Non-Hazing Policy of the Organization.

#### **Section 1: Name**

If the organization has "UAB" in its title, it must follow the main portion of the name. If the organization is affiliated with a national or international organization, details of the affiliation should be adequately described.

#### Section 2: Purpose/Mission & Values

Organizations should take care to include a complete statement of purpose and objectives. Programs sponsored by the organization must comply and be consistent with the organization's stated purpose and objectives. Furthermore, organizations should determine their organizational values and ensure that they are clearly stated as fundamental, organizational beliefs.

#### **Section 3: Non-Discrimination Policy**

All student organizations desiring to benefit from student organization status with UAB must include in their constitution a non-discrimination policy statement that accords with the University's Non-Discrimination policy statement. Student organizations must use the following non-discrimination policy statement: The University of Alabama at Birmingham and (insert organization name) prohibits discrimination in admission, educational programs, and other student matters on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, age, national origin, disability unrelated to program performance, veteran status or genetic or family medical history.

#### Article II -

#### Membership: Qualifications and categories of membership.

Define membership criteria in this section. Membership should be defined as limited to currently enrolled UAB students.

#### **Article III-**

#### Officers: Titles, terms of office, type of selection, and duties of the leaders.

Officers represent the general membership and are elected or appointed from the ranks of the organization's voting membership. The titles of officers, the length of terms, specification as to which officers are elected or appointed, when they are elected, and by whom, and the general duties of each leadership position should be clearly specified. Organizations need to have the necessary leaders to conduct their activities.

#### Article IV-

#### **Dues**

A majority of the voting members should determine reasonable dues for each member, if necessary. Explain the process for determining dues, revising the requirement, or annual review of dues.



#### Article V-

Standing Committees (if needed): Names, purposes, and composition.

#### **Article VI-**

#### Advisor(s) Responsibilities and Authority

Responsibilities and expectations of advisors should be clearly and adequately described. UAB organizations must have a faculty/staff advisor. Refer to the Organization Advisor section of the Student Organization handbook for more information.

#### **Article VII-**

#### Meetings of the Organization: Required meetings and their frequency.

Required meetings and their number are specified here. For example, two general meetings of the membership may be required each academic term except for summer.

#### **Article VIII-**

#### Method of Amending Constitution: Proposals, notice, and voting requirements.

Proposed amendments should be in writing and should not be acted upon, but read in the general meeting in which they are proposed, should be read again at a specified number of subsequent general meetings and the general meeting in which the votes will be taken, and should either require a two-third or three-quarter majority of voting members (a quorum being present) or a majority or two-thirds of the entire voting membership of the organization, present or not. The constitution should not be amended easily or frequently.

#### **Article IX-**

#### Method of Dissolution of Organization

Requirements and procedures for dissolution of the student organization should be stated. Should any organization assets and debt exist, appropriate means for disposing of these assets and debts should be specified clearly and unequivocally.



## ORGANIZATION NAME DATE OF UPDATE BYLAWS

#### Article I-

#### **Parliamentary Authority**

Parliamentary Authority is often outlined in accordance with the Constitution and Robert's Rules of Order Newly Revised.

#### Article II-

#### **Membership**

Procedures for becoming a member, which may vary by membership category, amount of dues, if any, and how often they should be paid, termination of membership, and so on should be described in detail.

#### **Article III-**

#### **Election/Appointment of Leadership**

Elections rules and procedures, including eligibility for office, the nominating process, design of ballots and balloting procedures, and so on should be specified as well as appointment and ratification procedures. The timing of elections and/or appointments should be specified along with procedures to cover special circumstances (resignations, impeachments, etc.).

#### Article IV-

#### **Dues**

Specific details about dues, collection of dues, and provisions for failing to pay dues.

#### Article V-

#### **Meeting Requirements**

Regular, special, size and determination of quorum (number of voting members required to vote on decisions placed before the general membership, executive, and standing committees). This is an appropriate place to share training requirements, the set meeting time or "office hours."

#### Article VI-

#### **Accountability Procedures**

Identify accountability and disciplinary measures for members that do not meet organization requirements. Clearly state requirements, consequences, and method of disputing/appealing a decision.

#### **Article VII-**

#### **Method of Amending Bylaws**

Amending the bylaws should be similar to amending the constitution. However, bylaws are apt to change more often than the constitution, thus amending should be somewhat easier. Bylaws may be amended by proposing in writing and reading the change at a general meeting of the membership and then bring the proposed change up for a vote at the next general meeting with a 2/3 majority vote of the membership present (a quorum being present).

# APPENDIX II TRANSITION GUIDE

#### **Leadership Transitions Guide**

A thorough and intentional leadership transition plan will provide an organization with continuity so that future officers can build on the knowledge gained rather than starting from ground zero. Below is a guide to assist student organizations in navigating this transition.

#### Tips for a successful transition



• Officer terms should provide at <u>least one</u> month of overlap so new officers have the opportunity to shadow and learn from outgoing officers.



 When new officers have been selected, they should be oriented together as a group with all of the outgoing officers. Include the organization's advisor in this process as well. This process provides the new leaders with an opportunity to understand each other's roles and to start building their leadership team. Outgoing officers should openly share what they believe went well and what they would change if they had it to do over again.



 Make introductions to resources. Schedule time to walk around campus with the new officers and introduce them to important people who can serve as key resources (Advisor, Student Involvement & Leadership Office, Student Affairs, etc.)



 Recognize outgoing officers (could be certificates, thankyou cards, etc.). Show the group that leaders are valued and an important part of the organization.

#### The Basics Use this checklist to ensure you do not overlook anything as you transition leadership. Introduce new officers to the organization advisor(s) Update organization contact list (create if one doesn't already exist) and Engage roster. Re-register the organization on Engage (This is done annually July - August & December - January) Give access and instructions to any online platforms, such as: Organization email account • Social media accounts • Engage Website Online document storage (dropbox, google drive, etc.) • National affiliation website login information/passwords Any other communication the organization may utilize If the organization uses a mailbox provided by Student Involvement & Leadership, give the mailbox number and show where it is located. Remind to check at least once a week! If the organization transition officers AFTER registration has been renewed for the organization, please update the officers on Engage. Review the Student Organization Handbook. Explain how to reserve meeting/event space on campus for the year. If the organization is affiliated with a national organization, explain this relationship and any important information associated.

Finish all correspondence and pass on any unfinished items to new officer.

Share any and ALL documents

Sharing documents electronically allows new officers to easily update and make changes. Google drive and/or dropbox are two popular online tools to help store documents online easily.

Below are ideas of what to include:				
	Mission, vision, goals and purpose of the organization			
	Constitution/By-Laws			
	Budgets/Spending History			
	Meeting Agendas			
	Meeting Minutes			
	Program/Event Evaluations			
	Calendar of Events and Deadlines			
	Officer Position Descriptions			
	Committee Position Descriptions			
	Organizational Chart and Reporting Structure			
	Election/Selection Process and Timeline			
	Membership Recruitment Information and Timeline			
	Organization Contact List (Name, position, email and phone #)			
	Membership application (if applicable)			
	Event Planning Documents (if applicable)			
	Marketing Materials <ul><li>Logos</li><li>Photos</li><li>Marketing/branding guidelines established by the organization</li></ul>			

#### **Finances**

Share this finance check-list with your current organization treasurer and incoming officer to ensure no financial components of your organization's operations goes unattended to.

Discuss the financial status of the organization with the outgoing president, treasurer and organization advisor
Share where the organization receives money from (USGA, University, member dues, etc.)
If the organization receives USGA funding share what spending has been approved and how the organization receives the funding through the reimbursement process
If the organization has an off-campus banking account, update the authorized signers for the account to the new leadership, relay username and passwords for online banking and pass along organization checkbook (if applicable)
Discuss any fundraising plans or goals (if applicable)
Documents to share:  • Budget spreadsheet  • Past USGA funding applications (can be found on Engage)  • Any approved budgets

#### Introduce & Explain the Office of Student Involvement & Leadership

This office provides support and resources to all student organizations. Feel free to stop by the Student Involvement and Leadership Office in HSC 230 to introduce the new officer(s)!

- Register the organization All student organizations must re-register in the fall and spring semester to be an active organization. Re-registration takes place July 1st–August 31st and December 1st January 31st and can be done on Engage.
- Trainings SIL will offer trainings throughout the year on various topics to assist in managing and leading the organization. If the organization would like for the Office of Student Involvement & Leadership to do a presentation specifically for the organization, complete the "Learn to Lead" Presentation Request Form <a href="here">here</a>.
- Website SIL is building their online resources (such as this document) to help organizations be successful. Book mark www.uab.edu/studentorgs for easy access to these resources throughout the year.
- Involvement Fairs SIL Involvement Fairs are a great way to recruit new members, build membership, marketing the organization, and increase awareness about the great things the organization is doing on campus!
- Student Organization Newsletter This is a weekly communication sent through Engage. Please make it a habit to read this communication and share important updates with the organization membership.
- Flyer Printing There is a limit of 25 fliers per event. All requests can be made through the online request form on Engage. Find the Flyer Printing Request form here.
- Equipment Rental The equipment rental form lists what equipment is available for reservation as well as the pick-up and drop-off times once a reservation has been approved. Find the Equipment Rental Form <a href="here">here</a>.

Tak	es Along the Wisdom e some time to reflect on the past year along with the rest of the cutive board and identify the following:
	Culture of the group
	What was the best part about this position? What was the most difficult?
	What collaborations were successful?
	What projects or ideas did the officer begin to develop that the organization would like to see continue?
	What administrators/staff members were helpful?
	Review the organization's constitution, by-laws, and goals and outline any areas needing attention or revision
	Tips of running an effective meeting
	Ideas for improvement
	Prepare an end-of-the-year report. Some ideas for what to include are:  • Progress on any goals that were set  • Major Achievements  • Challenges  • Areas of improvement  • Advice for the future  • Program Evaluations (attendance numbers from events, and program assessments completed, feedback on whether or not the event should be continued)  • Budget Summary  • Leadership Conferences, Professional Development,  • Additional training any members participated in  • Service Hours & Amounts of philanthropic funds raised
	Recruitment ideas
	Be available for consultation or questions
	Checklist of Suggested Tasks for Incoming Officers
<b>②</b>	Read Transition Binder (or online documents) and previous executive reports. Become familiar with the general history of the organization and its recent activities. Remember each officer needs to know all of the little details as well as the big picture.
	Determine training and guidance the new officers will need from the outgoing officers. Think of questions after reviewing the transition documents.
	Make appointments with key people. What reoccurring meetings should be established (with the advisor, executive team, individual members of the organization, etc.)?

Review the Student Organization Handbook.

# APPENDIX III FUNDRAISING GUIDE

# FUNDRAISING GUIDE

#### **USGA SUPPORT**

Fundraising is an important resource for having money on hand for your organization. There are fundraising options that do not require funding, such as Percentage Nights. However, you may also use USGA funding to use money to make money, like running Sales Fundraisers. Preference for USGA funding will be given to fundraisers and events that are unique to the organization. As a reminder, USGA will not fund items such as t-shirts, pins, certificates, and name tags that solely benefit specific members of the organization.

#### PERCENTAGE NIGHTS

A percentage night is a joint effort between an organization and a restaurant. A date is selected and community members are invited to eat at the restaurant during a set time period. The restaurant donates a percentage of the profits generated by the organization (typically excluding alcohol and tips). The percentage usually ranges from 10 percent to 20 percent, but it varies by restaurant and location. Diners attending the fundraiser must present a flyer and state that they are there for the fundraiser. Furthermore, some restaurants will require that you reach a certain amount of profits in order to receive your earned donation. It is up to you to clarify the rules and requirements related to your percentage night.

#### **COMMON LOCATIONS**

Chipotle:

302 20th St S, Birmingham, AL 35233

- Donating Back 33%

- https://www.chipotle.com/fundraisers

Nothing but Noodles:

2800 Čahaba Village Plaza, Suite 140

- Donating Back 15%

- https://nothingbutnoodles.com

MOOYAH Burgers:

2112 7th Ave S, Birmingham, AL 35233

- Donating Back 15-25%

- https://www.mooyah.com/fundraising

Moe's:

1801 4th Ave S, Birmingham, AL 35233

- Average Price \$10; Donating Back 20%
- https://www.moes.com

Chick-Fil-A:

2000 Highland Ave S, Birmingham, AL 35205

- Contact your local Chick-Fil-A manager to set up a Spirit Night for your program.
- https://www.chick-fil-a.com/Locations/AL/5- Points-In-Line

This list is not exhaustive list.
Furthermore, this list does not serve
as a recommendation or endorsement
for any restaurant listed.
This list was created by USGA.

# APPENDIX IV EVENT PLANNING CHECKLIST

Creating the Blazer Experience

## PLANNING CHECKLIST



4-6 MONTHS BEFORE EVENT			
Develop Program Concept, Outcomes & Goals			
Select date/time and reserve location - ensure no conflicts with other large programs			
Establish planning timeline & deadlines; provide role clarity			
Contact potential partners or sponsors			
Select guest speakers, musicians, comedians, e	etc.		
Begin payment process (with Advisor)			
Advisors negotiate and route contracts (if applicable)			
Reserve large rentals from vendors (tents, inflatables, etc.)			
2-3 MONTHS BEFORE EVENT			
Submit marketing request (if applicable)			
Design marketing materials			
Order supplies for event if applicable			
Register event on Engage			
3-4 WEEKS BEFORE EVENT			
Begin marketing the program (80 flyers or 6 pos	sters for Res Halls - if annlicable)		
Reserve Office Equipment (coolers, tables, etc.)	,		
Secure additional personnel (Volunteers, security, etc)			
Order food			
Develop assessment tools with Advisor			
Create Day of Event Schedule (include tasks for event staff)			
Create shift sign up for board members (include setup/breakdown)			
I WEEK AFTER EVENT			
Debrief with organization	STUDENT INVOLVEMENT & LEADERSHIP		
Analyze assessment results	The University of Alabama at Birmingham		



#### **UAB GREEN EVENT GUIDE**

#### **Go Digital**

Reduce paper waste by creating a digital campaign for your event. Digital signage can be posted in the residence halls, Rec Center, and the Hill Student Center through the **Student Affairs Digital Signage Form** and in the academic buildings through the **College of Arts and Sciences Digital Sign Request Form**.

#### **Need a Meeting Space?**

The Solar House is a great place to hold meetings since it gets all of its energy from the sun and is free to reserve! It can hold around 25 people, and food is allowed to be brought in. Check out our solar house guidelines <a href="mailto:here">here</a> for more information on what the house can offer. Contact **solarhouse@uab.edu** to reserve the space.

#### **Commute Responsibly**

UAB Transportation lists several <u>sustainable commute options</u>, like the UAB bus system. Taking the bus over driving can cut down on your transportation greenhouse gas emissions by around 33% (Tina Hodges, 2010)! There are several bus routes that can take you all over campus. The buses can be tracked on the DoubleMap app or on the <u>UAB Transportation website</u>. You can also use UAB's many <u>bike racks</u>. Additionally, conduct the event over Zoom for larger parties to reduce the need for travel.

#### **Consider Food Options**

Go vegetarian for your event! Eating less meat lowers your greenhouse gas output (IPCC, 2022). If ordering meat is unavoidable, then avoiding red meat is the next best option. Chicken and fish farming releases fewer greenhouse gases into the environment than beef farming (IPCC, 2022).

Include gluten-free & vegan options to accommodate all diets at the event.

Use buffet-style catering instead of boxed meals. Make sure you specify that you do not want boxed meals. Ask for buffet or family-style catering options when ordering the food. This helps avoid excess packaging waste and allows people to take the exact amount of food they would like to eat

#### **UAB GREEN EVENT GUIDE**

#### **Avoid Bottled Drinks**

Ask your guests to bring a reusable bottle to the event. Every UAB building has water bottle refill stations and water fountains.

Use beverage dispensers and aluminum canned drinks (you can even get plain water in cans!). One plastic bottle can take 450 years to break down and will leach harmful chemicals into the environment in the process (WWF, 2021).

#### Reusable Utensils

Reserve our 50-person dining set for your event for free – we'll even clean the dishes for you! Simply email **solarhouse@uab.edu** 48 hours before your event and arrange for someone from your event to pick up and drop off the dishes at the UAB Solar House!

Don't forget to ask the caterer to omit napkins or plastic cutlery. Make sure you clearly state to the caterer, "Please do not include napkins, plates, cups, or cutlery in my order." Oftentimes, people do not know what reduced packaging means, so making it clear what you do not want is important.

#### **Avoid Food Waste**

For catered events, ask guests to RSVP ahead of time to avoid overordering food. Food waste accounts for 170 million tons of carbon dioxide released into the atmosphere every year (around 42 coal-fired power plants worth of pollution). (Jean Buzby, 2022)

For events with fewer people, ask guests to bring reusable containers to take any leftovers home to avoid food waste.

For larger events, have a food rescue plan in place to save excess food from landfill. A food rescue takes food that would go into a landfill because it cannot be resold and gives it to people in the community who are food insecure (Grace Klein Community, 2023). FeedBHM volunteers from the Grace Klein community are able to come to events between the hours of 6:00 AM and 11:00 PM to pick up excess uneaten food. Contact FeedBHM at 205–490–7516 a week in advance for volunteers to come pick up food and let them know the date, time, location of the event, if containers are needed to collect the food, and the contact information for someone who can wait for the volunteers to collect the food after the event ends. The volunteers will then call an hour before the expected pick-up time to confirm that food rescue is still needed. They can pick up full trays of food from buffet-style meals. If they need to bring containers because the food is in a container you need to keep, then you will need to let them know when you call a week in advance.

#### **UAB GREEN EVENT GUIDE**

#### **Decorate Mindfully**

Avoid adding dates to decorations so that you can reuse them for multiple events or purchase paper decorations that you can recycle after use. Look at purchasing reusable decorations like fabric tablecloths over using disposable ones!

Avoid giving out single-use items. Ask yourself if the item you are giving out can be used again and is something attendees want. Know Waste Options • Have clear identification of waste and recycling bins in proper containers & ensure guests are aware of these waste options before food is served. Make sure that guests know exactly what can be recycled and what has to go into the trash. UAB recycles clean paper/cardboard, clean aluminum cans, & clean #1 & #2 plastic bottles. Ensure that only these items go into the recycling bins, as heavy contamination in the recycling can cause the whole bag to be thrown away!

#### Say "No" to Plastic Confetti!

Standard confetti is often made of plastic and can negatively affect the environment. These little pieces of plastic end up as litter on the ground and wash away into drainage systems and local water sources. They then can harm aquatic life and birds, or get pressed into the ground, harming the health of the soil.

Instead, try water soluable confetti options, bubbles, or flower petals to have fun with in pictures- but with less environmental consequences.

For any further questions about how you can make your event sustainable, contact us at sustainability@uab.edu!

