



**COLLEGE OF MEDICINE
AND LIFE SCIENCES**

THE UNIVERSITY OF TOLEDO

STUDENT ORGANIZATIONS HANDBOOK

**PRODUCED BY:
OFFICE OF STUDENT AFFAIRS
HSC DIVISION OF LEADERSHIP AND PROFESSIONAL
DEVELOPMENT**

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TABLE OF CONTENTS

Office of Student Affairs Mission Statement.....	3
The Office of Student Affairs Responsibilities	3
UT HSC: A Facilitator University	3
General Guidelines for Student Organizations	5
Institutional Guidelines	5
Privileges of Recognized Student Organizations	5
Responsibilities of Recognition	5
The Role of the Organization Advisor	6
Categories of Student Organizations.....	6
Recognition of New Organizations	7
Constitution and By-Laws of Student Organizations	7
Officers	9
Elections.....	11
Mandatory Officers Meeting.....	12
Business Meetings	12
Student Organization Fair – Recruitment of New Students.....	13
Funding for Organizations	13
Planning Events and Programs	15
Reimbursement for Event	20
Probation.....	20
Grievances and Due Process	21

Mission Statement

Part of the mission of the Office of Student Affairs is to foster the professional development and leadership skills of the students through involvement in a variety of professional, career specialty, community service, multicultural, and avocational organizations and programs.

Involvement in these co-curricular programs and events is important for enhancing a student's curriculum vitae (cv) and competitiveness for residency and other post-graduate programs.

The Office of Student Affairs (OSA) Responsibilities

OSA serves as a source of administrative support to recognized student organizations and their activities and base our policies on [The University of Toledo Student Code of Conduct](#). The OSA office is located on the first floor of the Mulford Library Building. Support includes:

- Serving in an advisory capacity to assist with activities/programs, expenditures, and budget procedures
- Sponsoring training sessions, officer meetings and other student organization events
- Assisting organizations in applying for additional funding for new or innovative activities/programs
- Allocating funding to organizations for activities and programs
- Maintaining the HSC InvoNet page on the UT website including approving all organizational events
- Distributing information regarding student events
- Overseeing all reimbursements and deposits for student organizations and events

UT HSC: A Facilitator University

A facilitator university seeks to balance the rights and the responsibilities of its students within the confines of the rights and the responsibilities of the institution. The foundation of facilitation is shared responsibility for decision-making and risk management; the university and the students must work together to create a valuable involvement experience. The student involvement experience must include knowledge of acceptable risk and reasonable decisions as well as the processes by which risk is deemed acceptable and decisions are deemed reasonable. The university is obligated to provide tools that can be used by students to acquire this knowledge and the students are obligated to use this knowledge to facilitate a safe and fair involvement experience.

The Office of Student Affairs at The University of Toledo Health Science Campus recognizes the importance of co-curricular activities in the education of qualified, humanistic health care providers and medical researchers. In order to create an environment in which this is possible, we have adopted the facilitator university approach to student organizations and sponsored activities. This approach establishes a partnership between the OSA and the leaders, members, and advisors of student organizations; implicit in this partnership is the shared responsibility for making informed, reasonable decisions about student involvement.

The policies and procedures set forth in this manual are designed around the facilitator university model and allow all parties involved in the partnership to make informed, reasonable decisions that are fair and unbiased. This manual has been designed to function in concert with all federal, state, and local laws and

ordinances as well as with the institutional policies in effect at The University of Toledo Health Science Campus.

Consistent with our facilitator approach, the facilitators of recognized student organizations – the membership, the leaders, and the advisors – must accept partial responsibility for decision-making as well as for the inherent risk associated with these decisions.

Adapted from the Student Organization Manual, Texas A&M University, and The Rights and Responsibilities of the Modern University: Who Assumes the Risks of College Life? By Robert D. Bickel and Peter F. Lake. Carolina Academic Press: Durham, N.C., 1999.

POLICIES FOR HSC STUDENT ORGANIZATIONS

General Guidelines for Student Organizations

Student organizations play an important role in the life of students at UT HSC. They offer a wide variety of educational experiences that both enhance and supplement the curricula. They also provide opportunities for leadership and friendship. The policies and procedures included in this manual are intended to assist all student organizations in planning successful events and programs. The information provided here is for your information and may be subject to change.

I. Institution Guidelines

All student organizations affiliated with UT must abide by all federal, state and local laws and comply with all University policies. University policies can be found on the website: <http://www.utoledo.edu/policies/index.html>

II. Privileges of Recognized Student Organizations

- A. Recognition is granted on a year-to-year basis. Any student organization failing to reapply for active recognition status by submitting the required Annual Report on time and supporting documents will be considered *inactive*.
- B. Recognized student organizations have the following privileges:
 1. Association with the name of *The University of Toledo Health Science Campus*
 2. Use of UT HSC facilities subject to the established written policies and the rules governing such use
 3. Ability to petition for UT HSC funds by submitting requests to the OSA
 4. Access to campus for recruiting, fundraising, and publicity purposes
 5. Organizational InvoNet webpage
 6. Publicity through college publications and The University of Toledo Calendar of Events
 7. Bulletin boards and easels for the purpose of on campus promotion of the organizations and activities
 8. Access to miscellaneous resources provided by college departments and offices
 9. Services of the Office of Student Affairs

III. Responsibilities of Recognition

To retain official recognition, student organizations must meet certain expectations.

Requirements:

- A. Adhere to Organization Constitution and By-Laws
- B. Hold Elections as specified in Section of Student Organization Handbook
- C. Hold at least one business meeting per semester
- D. Hold at least one educational event per academic year
- E. Involvement in one community service event
- F. Adhere to all local, state, and federal laws; student handbooks and manuals; policies and procedures of the institution; and policies and guidelines established by each individual college.
- G. Remain in good standing with the university, including full compliance with any conditions, stipulations, or restrictions placed upon organizational recognition.

- H. Have a faculty/staff advisor who is an **employee** of the university.
- I. Keep the OSA informed of changes to organizational leadership or governing documents in a timely fashion by updating the InvoNet Roster.
- J. Demonstrate respect for the university community and other student organizations.
- K. Operate in a manner consistent with the mission and goals of the university and the governing documents of the organization.

Submit:

- A. Annual Report due January 30
- B. Election Results due January 30 (for the following academic year)
- C. Updated Constitution and By-Laws
- D. Student Organization Membership Roster updated in InvoNet by March 1
- E. Post business meeting minutes following each meeting (one required per semester) on InvoNet.

IV. The Role of the Organization Advisor

- A. Must be full- or part-time faculty or staff member at UT.
- B. Aware of the UT HSC Institutional policies, policies specific to their respective college, OSA policies, the Student Organization Handbook and any other institutional guidelines that establish expectations for student behavior and activities.
- C. Report all rule violations or potential violations to the appropriate university official.
- D. Aware of activities of the organization and have an appropriate level of knowledge related to the mission and activities of the organization.
- E. Meet with the officers of the student organization at the start of the academic year to discuss expectations, responsibilities and goals of the organization for the upcoming year.
- F. Attend executive and general meetings and be available outside those meetings for advice and consultation related to the operation of the organization.
- G. Receive and review copies of all minutes from the secretary of the organization.
- H. Receive copies of all budget information from the treasurer of the organization.
- I. Review the student organization's annual report, by-laws and constitution prior to submission to OSA.
- J. If the advisor wishes to resign the position, he/she should notify the OSA and the organization officers in writing. Upon resignation of an advisor, the club will have *14 days* to find a new advisor and notify OSA.

V. Categories of Student Organizations

- A. Each student organization will be placed in one of the following categories:
 - Academic/Professional
 - Cultural/Ethnic
 - Dance/Performing Arts
 - Gender/Sexuality
 - Health/Wellness
 - Music
 - Recreation/Games
 - Religious/spiritual
 - Service/Philanthropy
 - Special Interest
 - Student Governance

- B. Resources will be allocated based on number of organizations in the category
- C. Student organizations may request a change in category via email to OSA, however, change must be requested and approved prior to the start of the academic year (August).

VI. **Recognition of New Organizations**

HSC students may apply for new student organizations/interest groups during the month of January – follow the procedures outlined below. Proposals will be reviewed once per year by the OSA. Officers will be notified by March 1 regarding the status of approval.

Initial Requirements:

- A. A student org must operate unofficially under an existing student org for a period of at least 5 months. After the 5 month period, in January, the new proposed student org may contact OSA to discuss forming a new *Student Interest Group*.
- B. After operating for one year as a *Student Interest Group*, a new Student Organization may apply for official Student Organization status (i.e., the following January).
- C. Student organizations may not use the name, duplicate the mission and/or goals, or be similar in interest/scope of a currently recognized student organization on either the UT HSC or UT Main Campus.
- D. A UT faculty/staff advisor is required for the organization.
- E. A proposed interest group is required to produce evidence of a minimum of 10 members from the eligible population.

Submit:

- F. After operating unofficially under an existing student org for 5 months, and one year as a Student Interest Group, the Student Interest Group may contact OSA in January to discuss the proposed Student Organization.
- G. A Microsoft Word document copy of the proposed mission statement and constitution/bylaws must be sent to the OSA office. *After approval* of those documents, the student org will upload a Microsoft Word document of the proposed constitution and by-laws to InvoNet.
- H. The student organization must list potential members as well as officers by adding the names and inviting the members to the InvoNet page.

Approval Process

- I. Petitions will be reviewed by OSA in January and students will be contacted by March 1.
- J. The proposed president and advisor will be notified by the OSA requiring clarification or additional information.
- K. OSA will notify the acting president of the proposed organization of the final decision.

CONSTITUTION AND BY-LAWS

By definition, an organization is a “body of persons organized for some specific purpose, as a club, or society.” The process of writing a constitution will serve to clarify your purpose, delineate your basic structure, and provide the cornerstone for building an effective group. It also allows members and potential members to have a better understanding of what the organization is all about and how it functions.

- A. The constitution of an organization contains the fundamental principles that govern its operation. The by-laws establish the specific rules of guidance by which the group is to function. All approved student organizations must have their basic structure and methods of operation in writing including terms and descriptions of each office and what the procedures are when an office is vacated.

- B. No organization with restrictive membership clauses that discriminate on the basis of race, creed, ethnic identity, national origin, sexual orientation, sex, age or handicap shall obtain or maintain recognition status.
- C. Membership to organizations recognized by the OSA must be open to all students enrolled in UT HSC Colleges and Programs.
 - 1. Organizations are exempt from this policy if national or regional affiliation membership limits participation to a specific academic program.
- D. Each organization must have a constitution and by-laws on file in the Office of Student Affairs. If the organization is affiliated with a national group, there must be a chapter constitution on file. Each organization must review its constitution and by-laws on a yearly basis and submit an electronic updated or reviewed copy to their InvoNet page.
- E. Each organization must have a copy of their updated constitution available on their student organization InvoNet page.
- F. The current constitution and by-laws is located under your organization documents in InvoNet. After review by the organization, the form along with any changes must be uploaded to InvoNet no later than the first of March.
 - 1. To update an organization's constitution and by-laws, a *Constitution and By-laws Update form* (found on InvoNet under forms) must be submitted to InvoNet.
- G. Failure to meet the deadline may result in sanction of the organization for the year.

VII. Articles covered in the Constitution

- A. Article I: The name of the organization
- B. Article II: Affiliation with other groups (local, state, national, etc.)
- C. Article III: Mission and functions of the organization
- D. Article IV: Membership requirements (how determined, who's eligible, etc.)
- E. Article V: Officers (titles, terms of office, duties)
- F. Article VI: Advisor (term of service, how selected)
- G. Article VII: Quorum (number of members required to transact business)
- H. Article VIII: Meetings (frequency, special meetings and who calls them)
- I. Article X: Amendments (means of proposal, notice required, voting requirements)
- J. Article XI: Ratification (requirements for adopting this constitution)

VIII. Information covered in the By-Laws

By-laws must not contradict provisions in the Constitution. They generally contain specific information on the following topics:

- A. Membership (requirements, resignations, rights and duties)
- B. Dues (amount and collection procedures, and special fees, when payable)
- C. Duties of Officers (powers, responsibilities, specific job descriptions, if not already specified in constitution)
- D. Procedures for filling unexpired terms of office, removal from office
- E. Executive Board (structure, composition, powers)
- F. Committees (standing, special, how formed, chairpersons, meetings, power, duties)
- G. Order of business (standard agenda for conducting meetings)
- H. Voting procedures – quorum (who has power to cast a vote)

IX. **Review of Constitution and By-Laws**

All incoming officers upon acceptance of their office, must review all constitutions and by-laws. This is accomplished by completing a *Constitution and By-Laws Update* form.

- A. It is the responsibility of the officers to review and verify that the constitution is updated and continues to be in compliance
- B. Once reviewed by the executive committee any changes should be voted on by the club membership
- C. After consensus by the club that the constitution and by-laws are complete, the signed form will be emailed to the OSA HSC.
- D. The OSA HSC may need to present the constitution and by-laws to the Associate Dean for Student Affairs in the College of Medicine in order to resolve conflicting issues.
- E. Should the constitution and by-laws need further updating, the OSA will notify the president and the organization who will have four weeks in which to consider/put in place the recommendation of OSA.
- F. Once a final draft is approved, the Student Organization must have an electronic copy of the constitution and by-laws uploaded to InvoNet.

X. **Officers**

- A. The officers of an organization will function according to the Constitution and By-laws of the organization.
- B. It is the responsibility of the officers to see that the following forms and reports are uploaded to InvoNet by the appropriate deadlines:
 1. Annual Report
 2. Treasurer's Report
 3. Constitution and By-laws
 4. Membership Roster
 5. Minutes of Meetings
- C. Grade Requirements
Positions of office can only be held by students who are in good academic standing as defined by their degree programs. The students must be enrolled at UT HSC.
 1. College of Medicine and Life Sciences
 - a) Good academic standing in years 1 & 2 is defined as the absence of any outstanding grades of Fail or Withdraw/Fail.
 - b) The guidelines for academic standing for the College of Medicine are located at http://www.utoledo.edu/policies/academic/college_of_medicine/index.html.
- D. Other Requirements

Core Officers

Organizations must have students in the Core Officer positions in order to maintain an active status.

Organizations not able to fill Core Officer Positions by January 30 will be placed on probation. If positions are not filled by March 1, the organization will be considered inactive. Incoming first year students may fill *one* officer position.

A. President

Qualifications:

- Leadership and organizational skills
- Objective and impartiality
- Knowledge of organization, mission, goals and by-laws

Primary responsibilities:

- Schedules and chairs business meetings
- Ensures quorum is present at business meetings
- Upholds the organization constitution and by-laws
- Ensures requirements are met
- Oversees educational and other events
- Presides over procedural questions if they arise
- Presides over debates and calls for votes
- Represents organization in an official capacity both internally and externally
- Completion and submission of Organization Annual Report
- Assumes responsibilities if another officer steps down until elections are held for replacement

B. President-Elect

- M1 Student
- Shadow current President
- Assist current President as needed
- Intended (not required) to be elected to fill President's role the following year

C. Vice-President

- Assumes duties of the president when latter is absent
- Prepares committee chairs when coordinating activities
- Assists president with by-laws and other functions
- Assumes role if president resigns

D. Secretary

- Maintains official records for the organization
- Maintains and submits membership roster to InvoNet
- Records and submits all business meeting minutes to InvoNet
- Completion and submission of Event Request and other required forms

E. Treasurer

- Maintain organization account accurately, both Foundation and OSA provided funds
- Accountable for all expenses and deposits on behalf of the organization
- Provide a report of expenditures, deposit and account balances to the President for the Business Meetings.
- Must approve the budget for the Event Request Forms or travel requests.
- The treasurer will be responsible for filing all reimbursement forms to the OSA, COMLS. The OSA, COMLS will only accept reimbursement requests from the treasurer of each organization.
- Failure of the treasurer to submit the requests according to the rules and policies set forth in this manual may result in vendors or students not being paid. The organization will be responsible for payment under these circumstances.
- When collecting dues, the treasurer should provide receipts to students.

Additional Officers: these duties may be assumed by Core Officers

A. Publicist

- The publicist will be responsible for all advertisement pertaining to an event.
- Submission of mass e-mail requests to the OSA for approval to be sent by the OSA office.
- Update information to be submitted on InvoNet/website pages of the organization and contact OSA office to notify of changes to be made.

B. Risk Assessment Coordinator

- Responsible for facilitating discussion within the organization on risk management issues pertaining to all event/programs and travel that is undertaken by the organization.
- Point of contact for the organization on risk management issues, and should ensure that communication is happening between the organization, the advisor and the OSA.
- Responsible for assessing the risk in which any organization is involved.
- Complete the Risk Assessment Form and submit it to the Chair of the event or secretary for submission to the OSA HSC within the time frame specified on the individual request form.
- Responsible for collecting and submitting waiver forms from participants for off campus events.
- Responsible for taking attendance via Corq/Check-In App or submitting list to Core Officer to submit to OSA
- Failure to have Risk Assessment approval from the OSA may result in the sanctioning of an organization.

XI. Elections

All elections must be held and results submitted to OSA by January 30.

Nominations:

- A. Officer positions to be elected from the incoming student body will be submitted in writing to the OSA no later than October 1. *Reminder: incoming/new students may only hold one core office position.* Incoming officers need to be updated in InvoNet by the outgoing officers.
- B. Officers will be elected according to the constitution and by-laws of each individual organization.
- C. Open elections must be held according to the following procedure:
 1. Nominations must be taken from the recognized membership. Membership rosters must be updated in InvoNet prior to election of new officers.
 2. Deadline for nominations must be publicized.
 3. Students must be in good academic standings (no fails, withdraw or defers)
 4. All ballots must have organization name, nominee name, date, and office sought clearly stated on one ballot.
 5. Should a nominee not be qualified, OSA will notify the nominee and the advisor. Notification will occur by e-mail. The date the e-mail is sent, or the date the letter is postmarked will count as the day of notification.
 6. Should the nominee become ineligible or decide not to run, it is the nominee's responsibility to withdraw their nomination, and notify OSA immediately.
 7. Upon approval of the Election Request Form it is the organization's responsibility to announce to the membership the date, place, and time of the election.

Voting

1. Only one ballot per student may be cast for each election.
2. Only active members on the membership roster will be allowed to cast a vote in any election held by an organization.
3. In no instance will hand or voice voting be a method of election.

Ballot counting:

1. Ballots may be counted by the election chair/committee and results announced immediately.
2. Positions that remain open after voting may be filled by a second written ballot on which all candidates are considered write-ins.
3. Write-in candidates are allowed for positions with no nominees; however, the results of the vote will *not be official* until academic standing of the candidate is verified by the OSA.
4. Minutes from the meeting and the election results must be submitted to the OSA no later than five academic days after the election.

Unfilled positions:

Organizations not able to fill core officer positions by March 1 will be placed on probation. Organizations have until September 1 to try to fill the positions. If positions are not filled, the student organization will be deemed inactive. First year/incoming students may only hold *one* core officer position.

XII. MANDATORY OFFICERS MEETINGS

OSA sponsors the Annual Student Organization Officers' Training and Student Organization Officer meetings.

- A. Two officers from each organization must attend every meeting in order for the organization to receive funding and support from OSA.
 1. If an organization fails to attend the Officer's Training and Mandatory Meeting, it will be put on probation.
- B. OSA will forward copies of the minutes from the officer's meeting to each organization's officers and to the Advisor of each organization.
- C. The purpose meetings are to:
 1. Provide training to new officers
 2. Discuss changes in policy or concerns of the organizations,
 3. Provide the opportunity to develop events to include all colleges at UT HSC
 4. Provide an opportunity to report on organizational activities.

XIII. BUSINESS MEETINGS

Each organization must schedule at least one business meeting every semester.

Must submit room request via InvoNet at least two weeks (10 business days) prior to meeting. Rooms are reserved on a first come/first served basis. Academic events take precedence and may bump organizations from a room if necessary.

- A. Only 30 – 60 minutes are allowed per business meeting.
- B. Rules of order should be followed.
 1. Roll call – List of those in attendance
 - a) **In order to conduct a legal meeting, you need a quorum—a minimum number of members required to be present as stated by your constitution.** This can be a set number (e.g., 20) or a percentage of the total membership, and should be defined in your constitution or by-laws. The president has to be sure that a quorum is present, and often accomplishes this by asking the secretary to call the roll. If there is not a quorum, the president should delay the meeting pending the arrival of absent

members. If enough members do not show up, business *cannot* be conducted. Informal discussion can be held, but nothing official can take place.

2. Reading and Approval of Minutes
 3. Treasurer's Report
 4. Discussion and planning of future events and travel, including risk assessment
 5. Committee and chair appointments for planned events
- C. The secretary's report of the agenda, a roster of attendance, and minutes must be submitted electronically via InvoNet to OSA within five academic days following the meeting.
- D. All planned events and programs, including social, should appear in the minutes prior to submission of the event/program request form.
- E. First meeting of the year agenda suggestions:
- Membership registration and dues
 - Complete and submit the Student Organization's Roster on InvoNet.
 - Review Constitution and by-laws and submit a *Constitution and By-Laws Update* Form to the OSA HSC.
 - Schedule and discuss upcoming events, programs, and fundraisers.

XIV. STUDENT ORGANIZATION FAIR & RECRUITMENT OF NEW STUDENTS

- A. Each organization has the opportunity to set up a display table to promote their organization and recruit membership.
- B. A registration fee *may* be assessed to offset the cost of the tables (deducted from the OSA student organization budget)
- C. All incoming and currently enrolled students on The University of Toledo Health Science Campus are invited to attend.
- D. A sign-up sheet for potential membership may be made available to students.
1. This does not in any way suggest that these students are members of this organization, only that they are interested in gaining more information.
- E. Potential members should be given the names and addresses of the officers, a scheduled date of the first business meeting and an RSVP request to attend the first business meeting.
- F. Membership to an organization must be requested by all students intending to become active members of an organization during the organization's first business meeting.

XV. FUNDING FOR ORGANIZATIONS

The Office of Student Affairs may provide funding to support college of medicine educational events planned through HSC Student Organizations. These funds are considered UT State funding; therefore, all rules and regulations of the State of Ohio apply.

A. State Funds:

1. The amount of funding available to student orgs each year may vary. Requests for the OSA funding are accepted as long as funds are available. Funds are provided once per fiscal year, limited to one transaction, and based on a first-come, first-serve basis (unused funds will not be credited to any Student Org).
2. Each Student Organization Category will be allocated funds to support educational events.
3. Organizations will be required to hold one educational event per year.
4. Only one educational event per organization will be supported, pending available funds.
5. To cover expenses for an educational event, student organizations must contact the OSA to discuss if funding is available and the purposes of the funds requested.
6. Requests will be reviewed by OSA.
7. Funds will be determined based on meeting specific criteria:

- Does the event support the Mission of the organization
- Learning objectives appropriate and obtainable
- The target audience is the HSC community
- Collaboration with other student organizations/community
- Faculty/Outside professional involvement
- Budget is reasonable for the activity
- Quality/outcomes assessment is included

B. UT Foundation:

Each organization may have only one account in which to deposit revenue. **This account must be administered through the UT Foundation.** All money collected by the organization must be deposited into this account. The account will be maintained by OSA. Each treasurer will keep a detailed record reflecting account transactions.

1. All checks being deposited are payable to “*University of Toledo Foundation.*”
2. Treasurer must complete a deposit form and attach with the funds (form found on InvoNet).
3. Spending of this money is at the discretion of each organization but must not violate UT or OSA policies. Expenditures must be approved by OSA *prior* to disbursement.
4. Original documentation of expense must be provided to OSA with the Reimbursement form (form found on InvoNet).
5. UT faculty, staff, and administrators may not receive payment or gifts for participation in events sponsored by student organizations. Member contributions may be collected and used to purchase a gift.
6. Failure to comply with the requirements stated herein will result in probation.

B. Fundraising and Solicitation

1. Proposals for fundraisers must be discussed with OSA to avoid duplicate/overlapping fundraisers and excessive solicitation of area businesses.
2. All fund-raising *events* must be registered through OSA by submitting the Fundraiser Request and Risk Assessment Form four weeks prior to the event.
3. The OSA HSC, and if necessary, The University of Toledo Health Science Campus Risk Management, will process all requests within a timely manner.
4. An organization may charge a fee for attendance at a fundraising event.
5. Vendors and members shall not be reimbursed directly from the proceeds of the event. Vendor or member reimbursement shall be made from the organization’s Foundation account or from OSA HSC.
6. Proceeds from fundraisers for deposit must be in the form of a check payable to the “*University of Toledo Foundation.*” Cash deposits cannot be accepted.
7. Credit card payments for sales/donations submitted to the UTF will be assessed a fee.

Items purchased for sale: OSA staff may purchase items for student organizations via a UT pCard; however, the organization must have funding available in their Foundation account in order to cover the costs upfront.

C. Dues and Event Admission Fees

1. Organizations may require dues payment as a condition of membership.
2. Dues amount must be stated in the organization’s By-Laws.
3. An organization may charge a fee for attendance at an event to supplement OSA allotted funding.

D. Donations

1. Alumni or other donations made through the UT Foundation and directed to individual organizations will be deposited in that organization's UT Foundation account. A tax credit can be claimed with appropriate documentation via the UT Foundation.
2. Money given directly to organization members must be deposited in that organization's UT Foundation account. Money donated in this way does *not* qualify as a tax credit.

E. Expenditures from UTF Funds (use Reimbursement Form)

1. Reimbursement to students for food for organizational events
2. Reimbursement for prizes, supplies, other expenses related to organizational events
3. Student travel to attend regional/national conferences related to their student organization:
 - a) Must obtain preapproval for travel through the Travel Request Form
 - b) Must follow UTCOMLS Excused Absence policy

All reimbursements must be submitted on a reimbursement form with original receipts and sign in sheet (sign in required each time food purchased using OSA/UTF funds is served).

XVI. PLANNING EVENTS AND PROGRAMS

All organizations MUST host a minimum of one educational event in the academic year

- Organizations seeking funding through OSA must submit a proposal to request funding by contacting OSA *prior* to submitting the event through InvoNet
- Proposals must be submitted at least four weeks in advance to ensure reviewing the proposal
- All proposals are reviewed by OSA
- Educational events requesting funding support through OSA will be reviewed and the Assistant Director will contact the Student Organization when a decision is made
- Collaboration among organizations is highly recommended
- Funding is limited through OSA

USE THE FOLLOWING GUIDELINES WHEN PLANNING THE EVENT:

A. Choose a program

When deciding what kinds of events and programs to schedule, keep in mind the mission/constitution of your organization. Here are some things to consider:

1. How does it meet the Mission of the organization
2. Target audience
3. Learning objectives of the event that are measurable
4. Format of program (panel discussion, presentation, workshop, etc.)
5. **Co-sponsorship of programs has many advantages:**
 - More thorough planning can be done with additional assistance,
 - More excitement and participation can be generated with more people and organizations involved in planning a program,
 - Multiple organizations can bring more funds to an event.
6. Remember the main focus of the event should not be the FOOD
7. Quality presenters
8. There are also a number of other resources: your national organization, appropriate on campus departments, past officers, and friends who have heard interesting speakers.

B. Choose a Tentative Date

1. To schedule an event, check the InvoNet Calendar under the Office of Student Affairs, HSC portal. You may want to consider the exam and class schedule, since this can have an important impact on attendance.
2. **Only 1 event/program** may be scheduled on a specific date and time frame. You may hold more than one event on any given day, just not at the same time.
3. If you must schedule a program at a time when another program is scheduled, contact the Officer/Chair of the organization sponsoring the program and ask about the possibility of running the two events on the same day. If something cannot be worked out between the organizations, the OSA HSC will make a final decision and preference will be given to the club who scheduled their event first, as determined by the time stamp on the InvoNet request form.

C. Choose a Location for an Event/Program

All room availability and scheduling will be handled by the OSA HSC via the HSC room scheduling department in the Registrar's office.

Rooms will be assigned by the room reservationist in the Registrar's Office. OSA handles all event requests only via InvoNet. Requests must be submitted at least 2 weeks (10 business days) prior to event.

Any off-campus site (e.g., a banquet hall) will require a contract and all contracts must be submitted and approved by General Counsel.

Rooms available for use on the Health Science Campus include:

1. Classrooms or conference rooms in Collier or Health Education building – see list of rooms provided when submitting an event request via InvoNet.
2. Off-Campus Sites/Main Campus
 - a) Contact the OSA before planning *any event*, even those that will take place at a location on Main Campus or off campus
 - b) Any off campus site such as a banquet hall, will require a contract and all contracts must be submitted and approved by General Counsel before they can be signed by the appropriate Dean. Contracts must be submitted at least 60 days in advance.
 - c) *Students under no circumstances are allowed to sign contracts pertaining to The University of Toledo*

D. Create a timeline for planning

An important planning tool is a timeline. If there are many people involved in the event, deadlines for specific responsibilities can ensure that the planning is coordinated. The best way to create these timelines is to work backwards from the date of the event, making deadlines for all essential tasks and assigning tasks to specific committee members. Regular meetings can ensure that all planning committee members are up to date as the timeline progresses.

SUBMIT REQUIRED FORMS through InvoNet

Event Request
Deposit Form
Receipt Upload
Reimbursement Form
Risk Assessment Form

APPROVAL WILL BE SENT VIA EMAIL TO PRIMARY CONTACT LISTED ON INVONET. THE EVENT MUST BE APPROVED BEFORE PROCEEDING WITH THE EVENT.

E. InvoNet Events

1. All students have access to events on InvoNet and should be encouraged to check it frequently to view upcoming events.
2. All events posted are subject to the Policies and Regulations of The University of Toledo Health Science Campus.

F. Speakers or Other Participants

Once you have approval from the OSA HSC, contact the speakers and others who will participate in your program. Some things to consider as you confirm their participation are:

1. Honoraria
 - a) If a speaker is a member of The University of Toledo Health Science Campus faculty or staff, they cannot receive payment for their services but may be given a gift from a source of funding outside of the University or the Foundation (i.e., a collection from a group of students).
 - b) If a speaker is requesting an honorarium or is submitting a fee for services, they must complete the substitute W-9 form that may be obtained from OSA HSC.
 - c) If you plan to offer an honorarium to your speaker, it will be necessary to obtain their name, address, and social security number in advance. **Do not pay an honorarium out of your own pocket or write a check— it will not be reimbursed.** Honorariums are subject to taxation and require the information stated above.
 - d) Payment cannot be given at the time of the function. A certificate of participation may be provided with a note to the speaker informing them that the check will be mailed to them.
2. The speaker must not urge the audience to take action which is prohibited by institutional policy or which is illegal under federal, state, or local law.
3. Advocating or urging the modification of the government of the United States or of the state of Ohio by violence or sabotage is specifically prohibited.
4. Outside speakers will be required to sign a contract with UT HSC prior to the engagement.

It is the responsibility of the officers and advisors of the sponsoring student organization to inform speakers of these rules.

G. Other Events

1. **Health Fair Screenings**
 - a) All health fair screenings, regardless of location, must be registered with OSA.
 - b) Proof of liability insurance must be provided to those locations requiring such documentation. The documentation is available from Office of Risk Management.
 - c) All health fair screenings must have a licensed physician or other qualified health care professional on site.
 - d) Every individual participating in a health fair screening must sign an Office of Risk Management approved waiver form.
2. **Campus-wide Drives (i.e., clothing, food, etc.)**
 - a) Submit an Event Request form via InvoNet to have the event added to the academic calendar.
 - b) Storage in OSA is not allowed.
 - c) Identification on the collection boxes must include the:

- i. Name of organization,
 - ii. Name, e-mail address and/or phone number of event contact person,
 - iii. Name of charity to which items will be donated,
 - iv. Dates of drive, and
 - v. Types of items being collected.
- d) Assign a person to monitor and empty the boxes on a regular basis
 - e) Advertising may be limited to Inonet, social media, and flyers approved by OSA (see next section).

H. Begin Promotion of the Event

There are a number of very effective ways to publicize programs on the Health Science Campus. Some of this publicity depends on whom you are trying to reach: students, faculty, staff, or the Toledo community; and the kind of event you are planning. Inonet Events can promote the event, while posters may be useful to reach students in various other buildings on the campus. First decide whom you want to reach and then use a few different advertising options for the best results.

1. All solicitation activities shall comply with the OSA guidelines, all other relevant UT HSC policies, and local, state, and federal laws.
2. Any solicitation of funds, goods, services or sale of advertising shall be approved *in advance* by the OSA.
3. On-Campus Communications
 - a) OSA must approve the distribution of flyers (paper or electronic) and posted material. All flyers must have an expiration date in the lower right hand corner.
 - b) All postings may not be attached to walls, doors, student mailboxes, outside building walls, cars, trees or shrubbery.
 - c) All posters must be displayed on easels obtained from the OSA.
 - d) Commercial and political campaign literature shall not be distributed on the UT HSC.
 - e) Electronic announcement through MyUT News must first be approved through OSA.
 - f) Announcements can be sent to the OSAMed@utoledo.edu email inbox to be sent to students.
4. Off-Campus Publicity
 - a) The organization must notify OSA before distributing materials to the off campus community.
 - b) Students distributing written communications throughout the off-campus community must comply with City Ordinance No. 2603. This Ordinance expressly prohibits the posting of signs on railroad overpasses, utility poles and city property, including streets, parks, etc. Violators are subject to fines. Posting signs on private property subjects the offender to arrest for trespassing.
5. ***No student, group of students, or student organization may represent UT HSC without prior authorization from the OSA.***

I. Arrange for Food

1. Make a list of your food needs based on your budget as submitted on Inonet and expected attendance.
2. Any charges for food over the estimated budget amount will be the responsibility of the organization. Exceeding an estimated budget amount may be paid for by charging a registration fee, by a donation from the participants, or from a Foundation account. The OSA HSC will not be responsible for any extra charges incurred.
3. If an account is not established by the OSA HSC with a vendor, a representative from the organization will have to pay for the food and be reimbursed at a later date. Make sure to

keep all itemized receipts and remember **that tax is not a reimbursable item** through the state account, only through a foundation account.

4. Gratuity can be covered up to 20%.

J. Food Vendors

1. At the event or program, it is the responsibility of the organization's Risk Assessment Coordinator to obtain the event attendance by either checking people in using the Corq app, or using a sheet to check in/check off all attendees.
2. For approved events, OSA can order and pay for food with the university pCard, provided the OSA has been contacted well in advance (four weeks) about making these purchases on behalf of a student organization. OSA has a billing arrangement set up with several vendors, please check with OSA prior to ordering. Students requesting reimbursement will need to follow the reimbursement process noted in this handbook. *NOTE: obtain the University of Toledo tax-exempt number from the OSA HSC, as sales tax will not be reimbursed.*
3. Contact the OSA office or appropriate vendor to order the food at least five business days prior to the event; for more than 100 people food should be ordered at least ten business days prior to the event.

K. If Alcohol is to be Provided

Any officially sponsored University of Toledo Health Science Campus student organization function that has alcohol, whether on or off campus, must abide by the University of Toledo Policy 01-062 and OSA HSC policy. An officially sponsored function means one in which (a) institutional funds are being used for any part of the event; or (b) the University of Toledo Health Science Campus name and/or logo are being associated with the event; or (c) the event is being advertised on campus *by any means*. All events at which alcohol will be served must be submitted and approved by OSA.

According to OSA HSC policy, student organizations may not use funds in the University of Toledo Foundation accounts to purchase alcohol. **Alcoholic beverages served at any Student Organization event can only be provided at a cash bar.**

A summary of Policy 01-062 is as follows:

1. **If an organization holds an event where alcohol is to be served, the following rules must be observed:**
 - a) State funds [OSA HSC Funds] may not be used to purchase alcohol. The University Treasurer shall be the sole determiner as to whether any particular funds are considered public funds.
 - b) **THERE WILL BE NO FUNCTIONS WHERE ALCOHOL IS THE MAIN FOCAL POINT OF THE EVENT. AN EVENT WITH NO APPARENT PROGRAM OR ACTIVITY WOULD BE CONSIDERED SUCH AN EVENT.**
 - c) **An Alcohol Registration Form and a Risk Management Assessment Form must be completed and submitted along with the Pre-Event Request Form to OSA HSC.**
 - d) Any advertising for the function will not include specific reference to the fact that alcoholic beverages will be provided.
 - e) The sale, distribution, or consumption of alcoholic beverages at any location on campus or any other property owned or leased by The University of Toledo Health Science Campus is strictly prohibited by student organizations.
 - f) Alcoholic beverages can only be provided by vendors who have appropriate license to distribute alcohol.

- g) At any function where alcohol is served, non-alcoholic beverages must be continuously available and featured as prominently as alcoholic beverages. **FOOD MUST ALSO BE AVAILABLE.**
- h) Sponsors of the event will implement precautionary measures (see Risk Assessment Form) to ensure that alcoholic beverages are not accessible or served to persons under the legal drinking age or to persons who are, or appear to be, intoxicated.
- i) The serving of alcohol must cease 30 minutes prior to the end of the event.
- j) Events sponsored by alcohol companies are strictly prohibited.

XVII. POST EVENT

- A. Submit an evaluation or assessment of the event; was it successful, feedback from the audience or presenters, notes for future/similar events, etc.
- B. Submit sign in sheet within five days of the event. Or, if the Corq app is used to check in guests, the attendance can be immediately downloaded by OSA.

XVIII. REIMBURSEMENT FOR EVENT

Failure to submit a post-event form along with the reimbursement form may result in not receiving reimbursement from OSA for the event.

A. Event/Program Reimbursement Form

- 1. The treasurer must submit the Reimbursement form within five days of the event. The Event/Program Reimbursement form must be submitted along with the following:
 - a. An accurate attendance sheet obtained from the Risk Assessment Coordinator must be submitted along with the Reimbursement Form, if the Corq app was not used.
 - b. All of the expenses incurred, along **with itemized receipts**, for the event must be listed on the Reimbursement Form.
 - c. Names and addresses of businesses or individuals receiving a reimbursement must be included.
- 2. If the event is co-sponsored, all treasurers must sign the Reimbursement Form and indicate which organization is to pay for the expense.
- 3. If an approved vendor is used for food or pCard payment (direct pay), receipt must be turned in with the sign in sheet which must include the organization name and date of event.
- 4. Reimbursement usually takes no more than four weeks after the treasurer has submitted the forms.
- 5. The OSA HSC will *only* reimburse individuals or vendors and not an organization.

XIX. Probation

- A. Probation will result due to:
 - 1. Any organization violating institutional policy or the rules of this handbook
 - 2. Not submitting appropriate documentation by due date as stated in the handbook
 - 3. Not filling core positions by September 1 of current academic year
- B. Organizations under probation may include, but are not limited to:
 - 1. Loss of funding
 - 2. Loss of recognition as an UT HSC student organization
 - 3. Loss of privileges as stated in Privileges of Recognized Organizations in this manual.
- C. An organization will be notified of probation by the Assistant Director of OSA. Organizations unable to meet the requirements stated in the handbook will be deemed inactive.

XX. Grievance and Due Process

- A. All grievances related to student organizations must be submitted in writing to the Assistant Director of OSA. The specific details of the event(s) that precipitated the grievance must be given. The document must be signed and dated.
- B. The Assistant Director of OSA will notify the president (or appropriate person) and faculty advisor of the organization in writing of the grievance within five academic days of the receipt of the grievance.
- C. The Assistant Director of OSA will arrange to meet with the president of the organization and/or appropriate person(s) involved within five academic days of the original notification. Notification of this meeting will be given in writing to all parties involved.
- D. If a grievance is unresolved after the meeting, as stated in Section C above, notification will be given to the student organization and/or appropriate person(s) that the matter is being referred to the Director of Student Affairs.
- E. The Director of Student Affairs will conduct a hearing within ten academic days of the receipt of such request.
 1. The president and advisor of the organization and appropriate persons will be notified in writing by OSA of the date, time, and location of the hearing.
 2. If the representatives for the organization fail to appear at the hearing, the hearing will be conducted in their absence.
- F. The Director of Student Affairs will notify the president and advisor of the organization and the appropriate person(s) of the decision within five academic days following the formal hearing. Any sanctions to be imposed will be stated in writing.