

EMERSON COLLEGE



**A Guide to Using
SGA Allocated Funds**

2010-2011

WELCOME

Whether you need to fill out forms for the equipment rental you need for a film shoot or you need additional funds to bring that speaker on campus, the 2010-2011 *Guide to Using SGA Allocated Funds* is here to help you. The *Guide to Using SGA Allocated Funds* will provide both detailed explanations on filling out forms, making financial transactions properly, and much more.

Here is the contact information for the **Student Government Association Executive Treasurer**, whom you should direct any and all questions regarding your organization's funds and treasury work throughout the year or if you need any additional information regarding your budgets, funds, and transactions.

SGA EXECUTIVE TREASURER CONTACT INFORMATION:

Stefany Tomas
150 Boylston Campus Center
Lower Level, Room L152
PH: 617.824.8686
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SGA_Treasurer@emerson.edu

FALL 2010 OFFICE HOURS

Wednesdays: 2-4pm
Thursdays: 2-4pm
Fridays: Appt. Only

Spring 2011 Office Hours TBA

SGA Joint Session meets every Tuesday at 2pm.
Check E-Common at <http://ecommon.emerson.edu> for meeting locations.

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INTRODUCTION

Responsibilities of SGA

Emerson College's Student Government Association's duty is to represent the student body to faculty, staff, administration, and the community at large. The responsibilities of SGA include, but are not limited to:

- Representing student interests, rights, and concerns
- Stimulating student awareness of and involvement in the many organizations, activities, and opportunities available in the Emerson community
- Promoting student awareness and appreciation of the values and traditions of Emerson College and the SGA
- Enhancing communication and cooperation between all segments of the campus community
- Providing and overseeing funding for student activities and organizations through a fair and representative annual process

Purpose of the SGA Treasury

While SGA addresses student interests, its Treasury supports the organizations that are recognized and funded by SGA. At the conclusion of an organization's first recognized semester the organization is reviewed by the Organizational Recognition and Review Board (ORRB) and may be eligible to appeal for an annual budget via the Financial Advisory Board (FAB). All SGA recognized organizations must go through the FAB process in order to receive funding for the next year.

Note: With recognition also comes responsibility of managing your organization's programs realistically within the limitations of existing resources and opportunities. The College seeks to support and encourage all student organizations in their creative process and will offer advice and assistance at every turn. We ask that you recognize that physical and financial resources are limited for both academic and co-curricular programs and seek your assistance in setting priorities and adjusting your plans as these limitations necessitate. We encourage you to seek the advice of both your faculty/staff advisor and the Associate Dean of Students in setting your priorities and in managing your organization's plans.

INTRODUCTION

Responsibilities of the SGA Executive Treasurer

- Create an overall budget for SGA, based on enrollment information and student activities fees through the FAB process.
- Act as a liaison between student organizations and Emerson College's Business and Finance offices.
- Audit the financial records of all SGA-funded organizations.
- Monitor phone service, copy service, and charges to all SGA-funded organizations.
- Present a Treasurer's report and make recommendations on financial matters to the SGA Joint Session and Emerson College officials when needed. Treasurer's reports will be available online through the SGA official website.
- Explain the financial system to all organization Presidents, Co-Presidents, and Treasurers.
- Oversee and facilitate organization purchases of products and services from College vendors.
- Oversee and facilitate the annual Financial Advisory Board (FAB).
- Have final approval and signing authority over all SGA-related financial matters.
- Post and hold weekly office hours.

The SGA Treasurer is not responsible for keeping receipts from purchases made by an organization. This is the sole responsibility of the organization to keep copies of all of their submitted paperwork and receipts on file. Neither SGA nor Student Life will keep copies of submitted receipts, bids, contracts, etc.

The SGA Executive Treasurer is willing to answer any questions you may have and will make every attempt to be available when needed.

INTRODUCTION

Organization Treasurers

When dealing with an organization's finances, the Treasurer should be the primary contact for all transactions. In order to maintain an efficient budget, it is important that the Treasurer have a thorough understanding of their own organization's budget, as well as the SGA Treasury policies and procedures outlined in this handbook. When these procedures are disregarded, important time can be wasted resulting in unnecessary delays, holding up an organization's access to funds, services, and materials.

Responsibilities of Organization Treasurers

Most organizations rely on funding in order to operate. Therefore, it is important that the Treasurer is fully aware of the financial needs and obligations of their organization. **Maintaining accurate financial records and preparing and submitting paperwork correctly and in a timely manner are the essential responsibilities of an organization's Treasurer.** The Organization Treasurer is also responsible to:

- Know and follow the correct procedures for obtaining, spending, and depositing money for the organization.
- Help maintain a reasonable budget for the student organization's operations.
- Keep track of the organization's account number and copy code.
- Keep detailed records of the organization's finances. **It is the responsibility of an organization's Exec Boar to keep copies of all submitted paperwork and receipts.**
 - This includes information regarding phone, copy, postage, and other expenses, as well as photocopies of submitted paperwork and supporting documentation.
- Keeps track of any equipment or materials the organization purchases or owns and has an updated inventory on file with the SGA Treasurer (for insurance purposes).
 - Only organizations with allocated office or storage space from the College are able to purchase equipment and office supplies.
- Keeps the organization's advisor informed about financial matters.
- Consults with the SGA Treasurer and Associate Dean of Students about **possible** expenditures.
 - **No commitment for products or services should be made without the approval of the SGA Treasurer.**

GENERAL PROCEDURES

Introduction to Emerson College Financial Procedures

Emerson College is a tax-exempt institution. In order to legally maintain this status, the College and SGA organizations must follow rules and business procedures as set forth by the IRS. SGA is the administrator of student activities fee, which each student pays every year, and therefore the following must be adhered to in order to maintain smooth financial operations:

- All organizations must be reactivated through the Student Life Office before granted access to funds.
- All financial paperwork must be submitted to the Associate Dean of Student's mailbox in Office of Student Life located on the second floor of 150 Boylston Street. **Paperwork submitted elsewhere will not be processed.**
- The SGA Executive Treasurer will only discuss budget information to an organization's President or Treasurer in person or via email.
- Forms must be filled out completely and accurately, including account numbers and contact information. If incomplete paperwork is submitted, the SGA Executive Treasurer will contact the organization Treasurer and/or President via email to complete paperwork. **Any incomplete paperwork will result in processing delays.**
- All forms must be signed by an Organization's President, Treasurer, and Advisor before submitted to the SGA Executive Treasurer. Forgery of any names will result in College disciplinary action, including loss of signatory authority and loss of funding.
- Organizations **must** keep copies of all paperwork sent/submitted to the SGA Executive Treasurer and/or Associate Dean of Students, including supporting documentation such as receipts, contracts, price quotes, bids and invoices.
- For all purchases over \$1000, Office of Purchasing and Risk Management must be contacted directly via email (while cc-ing the SGA Executive Treasurer and Associate Dean of Students) in order to request assistance in securing at least three written bids or price quotes.
- For computer equipment, the Information Technology department must be contacted to obtain bids and approval of purchases.

GENERAL PROCEDURES

- As a non-profit organization, Emerson College is exempt from certain taxes thus never pay taxes when purchasing products or services for your organizations.
 - SGA-funded organizations are eligible to use the College's tax-exempt number, which can be requested by contacting the SGA Executive Treasurer.
 - If a vendor requests a tax exempt certificate, contact the Office of Purchasing and Risk Management through the Associate Dean of Students and she/he will assist you in securing this documentation. *Please note: We are responsible for taxes of overnight hotel rooms.*
- The Dean of Students must approve and sign for any transaction over \$1000.
- The Vice President for Information Technology also must approve and sign for any computer equipment purchases over \$250.
- Both the Dean of Students and the President of the College must approve and sign any transaction over \$5000.

It is not necessary for the organization Treasurer to obtain signatures from the Dean of Students, or the Vice President for Information Technology unless requested by the SGA Treasurer in the case of a time-sensitive issue.

- **There is a five (5)-business day turnaround for all submitted paperwork**
 - Please allow additional time if signatures other than the SGA Treasurer's are required.
 - If incomplete or inaccurate paperwork is submitted to the SGA Treasurer, processing delays may occur. *If incomplete paperwork is submitted, the student contact on file will receive an email notification detailing the problem.*
- **All paperwork must be submitted by the last day of class in both semesters. Late paperwork will be considered on a case by case basis.**

GENERAL PROCEDURES

Restrictions on use of funds:

Certain expenditures of SGA funds are not permissible. Funds **cannot** be used for:

- Alcohol
- Anything Illegal (i.e. Parking Tickets, Fines, etc.)
- Cigarettes or Tobacco Products
- Gifts for organization members or advisors
- Taxes; bottle deposits; and/or tips
- Any donation to any organization (Emerson-related or not) where the money donated is not fund-raised
- Cash awards
- Expenditures for meals exceeding the per diem rates
- Tickets for school events, such as ERA Awards, the EVVY Awards, etc.
- Live animals (used as props or otherwise)
- For academic department related activities
- Spending that is inconsistent with an organization's purpose as stated in its constitution or the SGA constitution

Certain expenditures of SGA funds are not permissible without the prior approval of the SGA Executive Treasurer. *Without explicit permission from the SGA Executive Treasurer,* funds cannot be used for:

- Food for closed or general meetings
- Bottled Water
- Clothing
- Door prizes or other awards

If there are any questions regarding these procedures, please contact the SGA Executive Treasurer at *SGA_Treasurer@emerson.edu* or Sharon Duffy, Associate Dean of Students at *Sharon_Duffy@emerson.edu*.

USING CONTRACTS AND VENDORS

CONTRACTS

Contracts are used to bind vendors and non-Emerson individuals to services offered in exchange for payment. These are necessary to protect student organization's funds.

Contracts must include the following:

- Date, time, and location of the event/service
- Type of event/service
- Amount being charged
- Contact information including mailing address
- Valid Social Security Number or Tax Identification Number
- Proof of Commercial/Business Liability Insurance or signed Liability Waiver
- Completed and Original Signed W-9 form (see Appendix)

Processing guidelines for contracts

All contracts must be pre-approved by the Office of Student Life and the Dean of Students before services are rendered and before the SGA Executive Treasurer will process any paperwork. **You may use the sample contract located in the Appendix of this Guide.**

NO CONTRACTS MAY BE SIGNED BY STUDENTS OR ADVISORS! A student/advisor is not an agent of Emerson College or the Student Government Association. A student/advisor signed contract is NOT binding to Emerson College or SGA.

Contracts must be signed, by the Associate Dean of Students and Dean of Students. The original contract must be signed by the consultant/company.

A minimum four-week turnaround time is required for review of all contracts submitted. Please plan ahead when using contracts!

See the Off-Campus Events policy in the *Student Organization and Advisor Resource Guide* for contracts involving the use of off-campus venues. Please note: **All contracted speakers/performers/guests of the College must provide proof of insurance liability (NOT Health Insurance) or sign an insurance waiver with the Office of Purchasing and Risk Management BEFORE services may be rendered.** A guest may NOT perform or speak on campus without compliance of this policy. Contact the Associate Dean of Students with any questions.

USING CONTRACTS AND VENDORS

VENDORS

Using an Emerson approved vendor is the quickest and easiest way to get what your organization needs. Using Emerson approved vendors is almost always the safest and most dependable means to purchase products or services. Paperwork is also processed expediently when working with vendors since their information is already on file with the Business and Finance Office.

All Emerson approved vendors accept Purchase Orders and will supply the products or services prior to receiving payment, and many offer discounts. It is very rare that an organization should need to work with a non-Emerson vendor, and in these instances the pre-approval of the SGA Treasurer is required.

Emerson College maintains a list of approved vendors, or companies approved by the College that have proven to be competitive and reliable. The approved vendor list is extensive. The complete updated vendor list is available in the Office of Student Life and on the Office of Purchasing and Risk Management website. A copy of the most frequently used vendors is available on the SGA official website.

Please note that while a business may indicate that they accept Purchase Orders as a means of payment, that doesn't necessarily mean Emerson College will issue one to them for services. An Emerson College Purchase order will ONLY be processed to those vendors that have entered into a contractual agreement with the College. Businesses wishing to be considered as a pre-approved vendor of the College may inquire with the Office of Purchasing and Risk Management.

While any of the approved vendors are acceptable to use for services, **all office supplies must be purchased from Staples Business Advantage on a Staples Order Form submitted electronically to the Associate Dean of Students.**

HOW TO ACCESS FUNDS

There are eight different forms you should be familiar with in order to draw upon an organization's SGA funds. These forms are all available in the Office of Student Life. It is recommended that you keep a small supply of forms for your organization's convenience. All forms are used for SGA recognized organizations, and the forms your organization will be using are different than similar ones used by College departments. Examples of these forms are provided in the appendix of this handbook.

Purchase Requisition Form

- To be used as a contract with an Emerson vendor.
- Once the Purchase Requisition has been completed and approved, it is forwarded to the Office of Purchasing and Risk Management. Staff members in this office create a Purchase Order and contact the vendor to verify price and coordinate delivery. Appropriate end users are notified via email if email address is supplied.

Check Request Form

- To be used for payment to a non-Emerson vendor.
- To be used by advisors when requesting a cash advance.

Consultant Payroll Form

- To be used for payment to a non-Emerson individual (including alumni).

Expense Report & Reimbursement Form

- To be used for reimbursement to Emerson students, faculty, and staff only for organization business.
- To be used to submit return of advances (for advisors only).
- All Expense Reports & Reimbursement Forms require the inclusion of an Emerson Banner ID number.

Print & Copy Requisition Forms

- To be used for payment on printing and copying to the Emerson Print and Copy Center.

Deposit Form

- To be used to deposit funds into your organization's account.

Co-Sponsorship Form

- To be used for transferring funds from one SGA recognized organization to another. To be initiated and completed by the sponsoring organization. You may NOT use this form to transfer funds to an Academic Department account.

Staples Order Form

- To be used when purchasing office supplies. This form is to be submitted electronically to the Associate Dean of Students.

Using the correct form for each transaction is extremely important. **The majority of delays experienced with the Treasury result from incorrect paperwork.** This section will explain the proper use of each form to access your organization's money. Any paperwork submitted on incorrect forms will be returned to the organization, with an explanation as to why the paperwork is being returned. An email will also be sent to the President, Treasurer and Advisor of the organization from the SGA Executive Treasurer in this case.

PURCHASE ORDER REQUISITION FORM (PO)

Completed and approved Purchase Orders serve as contracts. If an Emerson approved vendor does not meet the requirements set forth on the order, then the College and your organization are not liable for payment. This serves as a safeguard for student organizations, since payment follows delivery and there is a hard copy of the agreement. **An example of a Purchase Requisition Form can be found in the Appendix. Remember to keep copies of all documentation you submit.**

The majority of purchases by your organization should be made via the Purchase Order system. There are many advantages to this system, the greatest being that students do not have to provide their own payment at any time during the transaction. Another advantage to using Purchase Orders is having the negotiating power and legal prowess of the Office of Purchasing and Risk Management behind you, since the school, not the student, is purchasing the product/service.

When submitting requests for purchase orders:

- Purchase order forms must be filled out completely with any supplemental information (invoice, etc) included.
- The Office of Purchasing and Risk Management requires that for all purchases \$1000 or more, at least three written price quotes be secured and attached to the PO Requisition Form. *The Purchasing Office must be involved in obtaining these price quotes.*
- Allow at least five (5) business days for Purchase Orders to be processed upon receipt in the Office of Purchasing and Risk Management; this is **in addition** to the turnaround time for the SGA Treasurer (and if necessary, the Dean of Students and/or President/Vice President) to approve the purchase.
- **LAST-MINUTE POs WILL NOT BE ACCOMMODATED. Please plan ahead.**
- Inquiries regarding vendors and vendor lists may be directed to the Office of Student Life and the Office of Purchasing and Risk Management.
- All Purchase Requisition Forms must be accompanied by a price quote, bid and/or contract stating services and/or products and prices.
- Emerson College and all student organizations must use pre-approved Emerson vendors for purchases unless a non-vendor is the only means of obtaining a product or service; in these cases, the transaction must be pre-approved by the SGA Treasurer, Associate Dean of Students and the Purchasing Office.
- Purchase Orders are to be used for college approved vendors, Information Technology (IT), and Travizon Travel Services (Air only).
- All Purchase Requisition number is NOT a Purchase Order number. A PO number will be generated by Office of Purchasing and Risk Management and sent to the vendor after all approvals are secured.

PURCHASE REQUISITION (PO)

Processing purchase orders:

A Purchase Order takes approximately five (5) business days to be processed after the Office of Purchasing and Risk Management receives it. After the Purchase Order is completed, the transaction is identified with a Purchase Order number, which is sent directly to the vendor via mail, phone, or fax. If the vendor specifically requests it hand-delivered, the SGA Treasurer can provide you with the written PO number. *Under no circumstances will the Office of Purchasing and Risk Management or the SGA Treasurer give students PO numbers over the phone.* Vendors are aware that students are not authorized to give out PO numbers and will disregard any given out by such persons unless accompanied by hardcopy proof.

Because payment follows delivery with Purchase Orders, it is vital that you inform the SGA Treasurer and the Office of Purchasing and Risk Management that you have received the product or service. Upon receipt of the product or service, e-mail both the SGA Treasurer at SGA_Treasurer@emerson.edu and the Office of Purchasing and Risk Management at purchasing@emerson.edu stating that the Purchase Order is clear to release for payment. Releasing the Purchase Order must be done as soon as possible to ensure timely payment to the vendor.

CHECK REQUEST FORM

Check requests are used to pay non-vendor companies for their services. **An example of a Check Request Form can be found in the Appendix.**

A cash advance of up to \$400 may also be requested using this form. Only advisors may receive a cash advance contingent on the pre-approval of the SGA Treasurer and the Associate Dean of Students. Cash advances must be reconciled within five (5) business days after use. A completed Expense Report & Reimbursement Form must be submitted to the Office of Student Life within this time period. The requestor of the advance will be held accountable for any missing funds.

When submitting check requests:

- The check request form may only be used when the services provided are **not** available through a vendor and have been pre-approved by the SGA Treasurer and the Office of Purchasing and Risk Management and/or Associate Dean of Students.
- Cash advances will only be made out to an Emerson faculty/staff advisor and must be reconciled within five (5) business days of their use.
- Emerson College is a tax-exempt institution; any checks withdrawn from an SGA-funded account may not include taxes.
- **All paperwork must be submitted at least three weeks before payment is due** in order to allow adequate time for the SGA Treasurer's approval.
- If a contract is involved, it must be pre-approved by the Associate Dean of Students before any paperwork is brought to the SGA Treasurer. (See section on Contracts for more information).
- **Keep a copy of all paperwork submitted for your records.**

Processing check requests:

In order for this form to be processed, you must submit the following:

- Completed check request
- An invoice or contract (see page 9 for Contract specifications)
- A completed and original W9 form. **No faxes, scans, or copies will be accepted.**
- A Employer Identification Number (also known as a Federal Tax ID Number)

Check requests are processed through the Accounts Payable Office, and are cut every Friday, once the request has been processed (a minimum of five (5) days). The check will be made payable to the person (Emerson individuals only) or company for the amount specified, and may be either picked up at the Student Service Center or mailed. Advance checks for advisors must be picked up.

CONSULTANT PAYROLL FORM

Consultant payroll forms are used to pay non-Emerson individuals for their services. **An example of a Consultant Payroll Form can be found in the Appendix.**

When submitting consultant payroll forms:

- The consultant payroll form may only be used when the services provided are **not** available through an Emerson approved vendor and have been pre approved by the SGA Treasurer and the Office of Purchasing and Risk Management and/or Associate Dean of Students.
- Emerson College is a tax-exempt institution; any checks withdrawn from an SGA-funded account may not include taxes.
- All paperwork must be submitted **at least three weeks before payment is due** in order to allow adequate time for the SGA Treasurer's approval.
- If a contract is applicable, it must be pre-approved by the Associate Dean of Students before any paperwork is brought to the SGA Treasurer.
- **Keep a copy of all paperwork submitted for your records.**

Processing consultant payroll forms:

In order for this form to be processed, you must submit the following:

- Completed consultant payroll form
- An invoice or contract (see page 9 for Contract specifications)
- A completed and original W9 form. **No faxes, scans, or copies will be accepted.**
- A Social Security Number

Consultant payroll checks are cut according to a set schedule established by the Payroll Office, usually every other Friday. There is a minimum processing time of five (5) business days for consultant payroll forms in addition to the time required for pre-approving contracts and obtaining the appropriate signatures. Payment via Consultant payroll may take up to five weeks. Consultant checks are typically mailed directly to the payee. Consultant payroll checks may take up to five (5) weeks.

EXPENSE REPORT & REIMBURSEMENT FORM

The Expense Report & Reimbursement Form is used to reimburse students and/or advisors for money spent on organization-related purchases and to reconcile cash advances obtained by advisors. **It is preferable, however, that an organization utilizes the Purchase Order system rather than reimbursements for its own financial security.** If a reimbursement is necessary, obtaining the SGA Treasurer's pre-approval will ensure the reimbursement can be honored. **An example of an Expense Report & Reimbursement Form can be found in the Appendix.**

When submitting expense report & reimbursement forms:

- As per Emerson College policy, reimbursements accompanied by original receipts older than ninety (90) days will not be honored. Reimbursement will not be made for expenses which have not been submitted within 90 days of the expense or events/trips that have not yet occurred.
 - Expense report & reimbursement forms **cannot** be used to pay individuals other than currently enrolled Emerson College students and employees; for non-Emerson individuals (including Alumni) please use the Consultant Payroll Form. **All forms MUST include an Emerson ID number in order to be processed.**
 - Original receipts covering the amount requested must accompany a completed Expense Report & Reimbursement Form. **These receipts must be taped to an 8.5 x 11" piece of paper and numbered to match the entry on the Expense Report and Reimbursement Form. Please list all reimbursement entries and receipts in date order.**
 - Please note, submitting a copy of a check you wrote does not suffice as proof of payment; in those instances, you must contact your bank and ask them to send you a copy of the front **and** back of the **cancelled check**. Contact your bank for this copy. This is not a unique request – banks do it ALL the time!
 - If receipts are submitted noting a group meal, you must list the names of **all** those present.
- You must submit the detailed receipt when submitting credit card receipts, **summary receipts will not be accepted.**
- Be sure to number order your receipts to ensure that all receipts are accounted for and submitted.
 - Taxes, tips, and/or bottle deposits will not be reimbursed and forms submitted that include these in the total to be reimbursed will be adjusted accordingly.
 - **Reimbursements will not be made for compensation paid to individuals.** Such payments for compensation are processed through Check Request or Consultant Payroll Forms.
 - Students/Advisors will not be reimbursed for travel **that has yet to occur** and are encouraged to use the College's travel agency. *See Trip Section.*
 - Alcohol, tobacco, or other items prohibited to be purchased using SGA allocated funds will not be reimbursed.
 - **Reimbursements will NOT be processed for Print/Copy charges.** Always fill out a print/copy form and use your organization account number for charges. *See Print*Copy section.*

EXPENSE REPORT & REIMBURSEMENT FORM

- **Reimbursements will NOT be processed for Aramark charges.** Always use the Catertrax system Departmental Approval system when making orders. *See Aramark section.*
- Be sure to include the reason/project/name/date/location of the project to which the reimbursement is related; forms will NOT be processed without this information.
- Reimbursements will only be made when the use of a Purchase Order is not available. The SGA Treasurer and the Associate Dean of Students reserve the right to withhold or cancel any reimbursements they deem adverse to college policy; such decisions will be made at their discretion when there is lacking evidence to justify the purchase.
- **Keep a copy of all paperwork submitted for your records.**

Processing expense report and reimbursement forms:

Once approved by the SGA Treasurer, the form will be submitted to the Accounts Payable Office for processing. Once the form is processed, a check will be made out to the Emerson individual for the amount specified. Checks are cut every Friday, with a minimum processing time of five (5) business days, once it has been received by the Accounts Payable office.

All reimbursements may be picked up at the **Student Service Center or mailed**, which is to be specified on the expense report and reimbursement form. Please note that students living in the residence halls **MUST** pick up their checks at the Student Service Center; they will not be placed in their mailbox.

EMERSON PRINT*COPY FORMS

These forms are used to commission work done at Emerson's Print * Copy Center, including letterhead, envelopes, printer paper, bulk copying, and custom printing jobs. There are three separate forms, each for a specific set of services. **Copies of these forms may be picked up in the Print Copy Center.**

- The **Copying Services** form is used for bulk copying jobs or smaller custom orders.
- The **Custom Printing** form is used for larger, specialized printing projects.
- The **Stock Printing** form will allow you to order customized letterhead, envelopes, note cards, and business cards. Please note stock printing may only be ordered for an entire organization, not specific members.

When submitting Emerson Print * Copy requisition forms:

- The specific form must be filled out completely, including the organization's account number and an exact description of the job requested.
- The "Authorized Signature" space is for the SGA Treasurer and the Associate Dean of Students **ONLY**; it is important to obtain the correct signature; otherwise, the Print * Copy Center will not process your job.
- **Reimbursements will NOT be processed for Print/Copy charges.** Always fill out a print/copy form and use your organization account number for charges.
- **Keep a copy of all paperwork submitted for your records.**

DEPOSIT FORM

The Deposit Form is used to deposit money into an organization's SGA account, usually after a fundraiser or after ticket sales. All money raised by an organization **must** be deposited into the organization's SGA account. **An example of a Deposit Form can be found in the Appendix.**

When submitting a deposit form:

- **DO NOT** keep money collected from sales or shows in your residence hall room or apartment; contact the SGA Treasurer to make arrangements for counting money.
- As per College policy, a fundraising form must be on file in the Office of Student Life **prior** to any collection of money.
- It can take up to **three weeks or longer** for a deposit to be posted and appear in your organization's budget; please be patient.
- All checks being deposited should be made payable to **Emerson College**.
- All checks being deposited should include the individual's telephone number and address, as well as the organization name and account number.
- Organizations are responsible for bounced checks and will take the monetary loss.
- Organizations must make copies of the checks you deposit to keep on file.
- Until your account is credited with the deposit, these funds may not be used.
- When depositing cash, band like bills together and roll coins as possible.
- **Keep a copy of all paperwork submitted for your records.**

Processing a deposit form:

Money must be brought to the SGA Treasurer within 24 hours of its receipt for counting. An executive board member of the organization must then bring it to the Cashier for deposit. If the Cashier is not holding hours when the deposit is needed, the money must be deposited into the Student Life safe until the deposit can be made. Make a copy of any checks and the deposit form for your records.

CO-SPONSORSHIP FORM

Co-Sponsorship Forms are used to transfer money from one SGA organization to another. Please note that transfers can not be made to or from any Academic Departments. Some examples of use include co-sponsorships for events or purchasing an advertisement from a student publication. *This form is different from the Interdepartmental Transfer Form used by the rest of the College.* **An example of a Co-Sponsorship and Transfer Form can be found in the Appendix.**

Rules for submitting a co-sponsorship and transfer form:

- Make sure the account numbers on the Transfer Form are accurate and legible or you risk funds being withdrawn/deposited into an incorrect account.
- SGA allocated funds may only be transferred between recognized and funded student organizations. SGA allocated funds may NOT be transferred to an academic department's account for any reason.
- You must submit documentation outlining the actual purpose of the transfer. This form will NOT be processed without additional documentation outlining a specific expense.
- Until your account is credited with the transfer, these funds may not be used.
- **Keep a copy of all paperwork submitted for your records.**

Processing Co-Sponsorship and Transfer Forms:

Submit completed form to the Office of Student Life. Please allow five (5) business days for paperwork to be processed by the SGA Treasurer. It may take up to **three weeks or longer** for a transfer to appear in an organization or department budget. Please plan accordingly.

STAPLES ORDER REQUISITION FORM

Emerson College, including SGA, uses Staples exclusively for ordering office supplies through their Staples Business Advantage program, which offers a discount of about 45% on supplies. Catalogues are available in the SGA Office and the Office of Student Life. *All Staples Order Forms must be submitted electronically.* All Organization Presidents, Treasurers, and Advisors will be sent an electronic Staples order form that can be filled out and emailed to place an order. **An example of a Staples Order Form can be found in the Appendix.**

Staples is to be used for the purchase of office supplies only. Computer equipment, paper, anything that requires electricity should be purchased through the appropriate vendor. If you are unsure as to whether or not you may purchase an item from Staples, please contact the SGA Treasurer or the Office of Purchasing and Risk Management directly.

Processing Staples order requisition forms

All Staples order forms are to be submitted *electronically* to **SGA_Treasurer@emerson.edu** and **Sharon_Duffy@emerson.edu**. Supplies are delivered within 3-5 business days of ordering. You will receive an email notifying you that your order has arrived and you can pick up your order in the Office of Student Life.

OTHER SERVICES AND POLICIES

ARAMARK Catering

One of the most convenient means of providing food at an event is to utilize the College's on-campus vendor, ARAMARK. When placing an order with ARAMARK, visit the Catertrax website at <http://emerson.catertrax.com/> **at least two weeks in advance** to select your menu, obtain prices and check availability of certain menu items. You must also provide the date, time, and location of the event that is being catered, along with your organization account number. Consult with Property Management as to whether food service is permissible in your venue.

For menu assistance, contact ARAMARK at 617-824-8060 or consult the catering/student catering menu, which is available in the Office of Student Life, the SGA Office, and online at http://www.emerson.edu/business_services/food_services/catering.cfm.

Please note the following process to be used when ordering Aramark:

1. Go to the Catertrax website – either by visiting <http://emerson.catertrax.com/> or by clicking on “Catering” from the Business Services website (http://www.emerson.edu/business_services/food_services/catering.cfm). *Please note: Only Organization Presidents and Treasurers may manage and place orders on the Catertrax website.*
2. Register yourself as a new user.
3. You can then “Create New Catering” by clicking on the green box to select your items.
4. Select and confirm your items; enter your customer and event details; review your order and then check out.
5. When you check out, you will be asked to supply the email of your budgetary authority to approve the order. **For all SGA recognized student organizations, you MUST send your catering order approval request to the following: The President/Treasurer and Advisor of your organization, the SGA Treasurer (SGA_Treasurer@emerson.edu) and to the Associate Dean of Students, Sharon_Duffy@emerson.edu. If this procedure is not followed, your order will NOT be processed or approved.**
6. When you submit your order, you will receive an email confirmation, as does the approval manager you named as the budgetary approval sources.
7. An order will be denied if the organization's budget cannot handle the charges as outlined in the order, or if the event you are hosting is not an approved event.
8. All SGA recognized Student Organizations are expected to follow the protocols expressed in the Treasurers Manual. Catering orders placed outside of these policies may not be approved.
9. SGA organizations may NOT purchase bottled water without the expressed approval of the SGA Treasurer. You may request carafes of water.
10. **Keep a copy of your email order for your records.**
11. If you experience any problems in your service/order, it is your responsibility to alert the Associate Dean of Students within 24 hours of your event, otherwise, we must assume your order was fulfilled and we will authorize immediate payment.

OTHER SERVICES AND POLICIES

Please consider when placing Aramark Orders:

- If you are looking for a custom order, or want to order items off the posted menus, you will need to contact the Catering Manager directly to place an order. The same would go for discussing price adjustments for “out of the ordinary” orders.
- You can cancel orders within 48 hours of the event without being charged for the event.
- **You must place your event at least 5 days in advance of the event.** When you select your date, you may find the date to be highlighted red, yellow or green. Red meaning they cannot accept your order; Yellow meaning you must call the Catering office to see if they can accommodate your date given the late notice; or Green meaning your order can be processed as usual.
- There is a tutorial at <http://emerson.catertrax.com/shoptutorial.asp> if you need additional help with making Aramark orders.
- **Reimbursements will NOT be processed for Aramark charges.**

Copy Machines:

There are copy machines located on the lower level the Campus Center at 150 Boylston Street for the convenience of SGA funded organizations. All recognized organizations are assigned a copy code by the Office of Student Life that allows access to these machines. The organization’s SGA account is charged directly for any copies made under this copy code. Copy codes must be signed out in the Office of Student Life after your organization reactivates. *Personal use of copy machines using an organizations’ copy code is not permitted.* SGA reserves the right to freeze an account for abuse of copy machine privileges. Any individual found responsible for misusing copy privileges will be subject to disciplinary action. **SGA will not reimburse you for using your personal print credits for an organizational expense.**

Equipment/Furniture/Office Supplies:

All equipment, furniture, and supplies purchased or received by an SGA organization remain the property of SGA and Emerson College. Contact the Office of Purchasing and Risk Management directly for assistance with obtaining furniture or contact the Information Technology Department for computer and/or equipment purchases. Only organizations with approved office and/or storage space will be allowed to purchase furniture and/or computers/computer equipment or supplies. ***No organization may trade or dispose of equipment without permission from SGA.*** Organizations must keep an up-to-date inventory of all equipment and furniture in their possession and submit it during Financial Advisory Board process, including all computer and telephone equipment. Furniture and technical equipment is for organization use only, becomes property of Emerson College, and may not be used for personal reasons. **In the event that an organization becomes inactive, all property reverts to SGA ownership.** No organization equipment may be stored in a student’s residence hall room or apartment during College breaks.

OTHER SERVICES AND POLICIES

Telephone:

Organizations that have on-campus office space that allows for setup of a telephone line may do so by contacting Telecommunications at x8585. Telecom will require pre-approval from the Associate Dean of Students, who will require acknowledgement from the organization Advisor that such service is necessary and that the Advisor is willing to monitor monthly telephone bills. Please be aware that there is a monthly charge for phone service as well as an equipment charge for the telephone handset of \$22.50 (subject to change) per line, per month, not including calls. The monthly phone charge is applied even if the telephone is not used and during summer and winter breaks. For long distance calls, a long distance code must be assigned. Contact the Associate Dean of Students to inquire about obtaining a long distance access code. Telephone charges are billed directly to the organization's account and are supervised by the SGA Treasurer and the Associate Dean of Students. *Organization telephones are for business use only.* Misuse of phone privileges by any individual is grounds for disciplinary action.

Sending Mail & Packages:

All mail and packages must include the organization's account number in the upper left hand corner. It can then be placed in an Emerson mailbox or brought directly to the main mailroom on the Lower Level of 100 Boylston Street. The organization's account is charged directly by the mailroom. For postage totaling over \$50, the SGA Treasurer's approval is required on a Transfer Form. It is recommended that you keep track of any mailings you make to avoid being over or undercharged. For large mailings, it is advised that you bring a sample of the mailing to the mailroom to be weighed.

Computer Equipment:

All computer equipment purchases by student organizations must be made through the College's Technology Analyst, who can be reached at the Computer Help Desk (x8080). The Technology Analyst will be able to assist with determining your organization's computer needs and securing the appropriate equipment at the most competitive rates. Only organizations with College allocated office space will be able to purchase computer equipment.

Room Reservations – One Stop:

Student organizations may book rooms on campus at no cost to them. To reserve a room dial x8880 from any on-campus phone (or 1-866-585-4520 from off-campus) at least 48 business hours in advance to book Property Management function rooms. You will be asked to supply a 15-digit code; which is your account number (ex. 0002-10-XXX-88600-99). This account number can be released to an organization President and Treasurer by contacting the SGA Treasurer or the Associate Dean of Students. You will not be charged for the room reservation unless damage to the room occurs, as determined by Property Management. If you have any questions about space booking, contact the Property Management Office.

For information on booking rooms other than the Beard Room, the Bill Bordy Theater and Auditorium, and the Dining Hall, please consult the *Student Organization and Advisor Resource Guide*. **All rooms in 150 Boylston Street (Piano Row) and the Cabaret can be booked at the Campus Center Help Desk in 150 Boylston Street.**

OTHER SERVICES AND POLICIES

Media Services:

If your organization should require A/V equipment for an event, you must indicate this when placing your reservation order with One Stop. Once your reservation has been confirmed, a member of the Media Services Staff will contact you regarding your specific needs. Please note that equipment needs for non-course related events will be charged to your organization's account. A complete listing of services and special student rates is available online at http://www.emerson.edu/library/media_services/ and in the Appendix of this Handbook.

Office of the Arts Managed Spaces:

The Office of the Arts operates several of Emerson College's performance facilities on campus including the Paramount Black Box, Bright Family Screening Room, Paramount Studios and Semel and Greene Theatres. These spaces are available for student use and the application procedure will be posted online in the fall and spring. Availability is limited and priority is given to the academic needs and Office of the Arts programming. Student use requires the presence of a Technical Supervisor at the project's expense, and based on the nature of the project, the Office of the Arts may require additional staffing as well. **Contact Bonnie Baggesen at 617-824-8363 or via email at Bonnie_Baggesen@emerson.edu for more information or assistance.**

Film Shoots: **Introduction**

All Emerson College students must adhere to the policies and procedures associated with shooting film/video and/or recording audio and for securing permission to do so:

- On Emerson College Property
- On Public Property
- On Non-Emerson College Private Property (Request for Certificate of Insurance)
- In the Tufte PPC Studios or Journalism TV Studio

Any revisions to the Shooting Policies and Procedures and forms may be found at the TRF web site:

- www.emerson.edu/trf - select "Policies/Forms"

or you may pick up a copy at the:

- Equipment Distribution Center (EDC) 1st floor, Little Building
- TRF Studios Support Office, 8th floor, Tufte Performance & Production Center, Rm. 814
- Journalism Television Facilities (JTF) Support Office 6th floor, Walker Building, Rm. 631

At least two weeks prior to a location shoot students should submit the appropriate permit request to Timothy McKenna, Equipment Distribution Center Manager, for processing. These policies and procedures apply to student organizations, The Emerson Channel, Emerson Productions, faculty, students and staff.

Location film and video production carries risk. While you may make every attempt to exercise safety precautions on a location shoot, you may be held legally and financially liable in the event of an accident that happens as a result of that shoot.

NOTE:

- The College does **not** provide insurance for equipment on loan from the Equipment Distribution Center (EDC).
- The College does **not** provide insurance on equipment rented outside the College.
- The College does **not** provide workman's compensation insurance for talent including members of SAG and AFTRA.

This is your financial responsibility.

PENALTIES

Violations by students of the following policies and procedures may result in one or all of the following actions:

1. Suspension of production activities.
2. Formal charges and disciplinary action by the College as outlined in the Student Handbook.

SHOOTS THAT REQUIRE SPECIAL PERMISSION

1. Shoots that require the use of firearms (real or prop), smoke or fog machines, live animals, or young children *require special additional permission*.
2. Shoots that require access to buildings or locations after hours may require special additional permission.
3. Timothy McKenna, Equipment Distribution Center Manager, TRF, (617-824-8349), can provide procedures that outline requirements for these special requests.

See the TRF website for Policies/Forms and Services. Please contact the TRF Office and the Office of Purchasing and Risk Management with questions regarding insurance.

TRIP PROTOCOL

Before embarking on any organization-sponsored off campus trip (such as a conference, retreat, or film shoot), the following must be completed.

At least two weeks prior to departure:

- A Trip Registration Form and participant list (ID #, last and first name of all interested in participating, including advisors) must be turned in to the Office of Student Life
- All financial paperwork must be submitted.

At least 72 business hours prior to departure:

- A signed Assumption of Risk and Release Form for **each** trip participant (see Appendix), including advisors, and a complete list of participants with ID numbers must be turned into the Office of Student Life.

Both Trip Registration Forms and Assumption of Risk and Release Forms are available in the Office of Student Life. For more information regarding field trips, please consult the Student Organization and Advisor Resource Guide or the Office of Student Life.

Trip Financial Policies

As per the College establish per diem rate, each individual may spend up to the following amounts on food per day:

- Breakfast ~ \$13.00
- Lunch ~ \$20.00
- Dinner ~ \$38.00

This is the **MAXIMUM** amount (including tips) that may be reimbursed. It **DOES NOT** permit the purchase of alcoholic beverages or any other items that may not be purchased with student organization funds. *Reimbursement receipts for meals must be numbered and accompanied by a list of people who dined together, and taped/stapled to an 8x11 piece of paper that is stapled to the back of the Expense Report and Reimbursement Form.* Cash advances taken by advisors must be reconciled within five (5) business days after use. If you are unsure of what SGA funds will cover on a trip, please contact the SGA Treasurer prior to submitting any financial paperwork.

TRIP PROTOCOL

- Transportation and lodging expenses should be itemized showing itinerary, mode of transport and/or place. These expenses should relate only to expenses which cannot be processed by the Purchasing Department. Employees should refer to the College's travel policies to ascertain whether or not these expenses must be arranged with the Purchasing Department.
- Other business expenses which cannot be previously classified are also to be itemized, with a brief description of the nature of the expense.
- The College follows the IRS standard mileage rates when reimbursing for business related expenses. See <http://www.irs.gov/taxpros/article/0,,id=156624,00.html>.

PLEASE NOTE: While the rates of per diem are distributed to allow for maximum expenditure, the Student Government Association HIGHLY encourages fiscal responsibility, and urges students to not be excessive with the spending of their per diem allowance.

Additionally, College funds spent on behalf of a trip participant are typically non-refundable and non-transferable. Trip participants are financially responsible for all funds expended on their behalf in the event of their cancellation or subsequent ineligibility per College policy.

FINANCIAL ADVISORY BOARD (FAB)

The Financial Advisory Board (FAB) is a body of students charged with reviewing all requests for yearly funding by SGA organizations. Each Spring, FAB reviews budget proposals from each SGA-funded organization and recommends allocations for the upcoming academic year to SGA. This is the only time during which SGA-funded organizations can be considered for annual funding.

FAB occurs in the spring semester. The SGA Executive Treasurer selects one representative from each class to serve as members of FAB, as well as additional SGA and college officials as deemed by the SGA Treasurer.

Full FAB packets will be made available to organization Presidents and Treasurers during the first week of the Spring 2010 semester. This section is only an overview of the process. **IT IS VERY IMPORTANT THAT YOUR ORGANIZATION PARTICIPATES IN THE FINANCIAL ADVISORY BOARD PROCESS!** If you choose to not participate or turn in paperwork late, your organization will not receive a budget for the 2011-2012 school year.

Financial Advisory Board Membership:

Outgoing SGA Treasurer, Chair
Outgoing SGA Vice Treasurer
Representative from Senior Class
Representative from Junior Class
Representative from Sophomore Class
Representative from Freshman Class
SGA Advisor(s)

Every effort is made to select members of FAB who do not have a conflict of interest in Treasury proceedings when budgets of student organizations are concerned. An invitation to participate as a member of FAB is at the discretion of The SGA Treasurer and is approved by the Associate Dean of Students.

Duties of the Financial Advisory Board:

- Meet with and review all student organizations requesting funds.
- Investigate any SGA-funded organization whose budget is suspended and make a formal recommendation to SGA.
- Make long-term financial policy recommendations to the SGA on such issues as criteria for funding, fee increases, and vendor dealings.
- Assist the SGA Treasurer in creating SGA's annual budget based on FAB's review.

FINANCIAL ADVISORY BOARD (FAB)

What the Financial Advisory Board takes into account when determining funding amounts:

- Whether the numbers provided in the packet are concrete and well-researched.
- Number of active members and outreach to multiple majors.
- Benefit of organization's proposed budget spending to the student population.
- Ability to spend funds wisely and responsibly.
- Spending (actual and anticipated) that support the mission and purpose of the organization and of the College.

Procedures

Each organization is responsible for supplying the SGA Treasurer and the Office of Student Life with one copy each of the completed FAB packet distributed in March. These must be submitted in hard copy by the SGA Treasurer's specified due date, as well as emailed to SGA_Treasurer@emerson.edu.

The following must be included in your Financial Advisory Board packet:

- Your Organization's Constitution (hard copy).
- A brief cover letter describing your organizational infrastructure, how your organization benefits the Emerson community, and any other key information you feel FAB should be aware of when making their recommendation.
- A detailed budget outline of expenditures for the previous fiscal year.
- A detailed budget outline of expenditures for the upcoming fiscal year.
- An all-inclusive inventory, including a technical equipment record, listing equipment type, brand, model, and approximate date of purchase.
- A memo from your advisor stating they have reviewed your proposed budget and including their contact information.
- A list of authorized signatures for the next fiscal year (hard copy and email).
- A list of summer contact information.
- A list of your organization's officers with addresses, telephone numbers, and email addresses.
- A list of your organization's active members, including the number of undergraduate and graduate students.

The following must be emailed in addition to submission of the completed packet:

- Cover letter
- Fiscal Year 11 budget (2010-2011 Academic Year)
- Fiscal Year 12 proposed budget (2011-2012 Academic Year)
- Inventory list
- Authorized signatures
- Summer contact information
- Members of your organization

FINANCIAL ADVISORY BOARD (FAB)

In addition to the submission of the completed packet and email attachments, *an organization does have the ability to add optional material for the financial advisory board to take into account including, but not limited to:*

- Letter of recommendations from students, staff, and college officials.
- Samples of work your organizations has completed.

This information must be emailed to the SGA Treasurer at SGA_Treasurer@emerson.edu.

Each organization should create three master proposal packets that include all of the aforementioned information. All FAB paperwork, with the exception of your organization's constitution and cover letter, is provided in the FAB packet, which will be emailed to your President and Treasurer in January.

Your completed packets must be submitted to the SGA Treasurer in person and via email during the specific designated time by the SGA Treasurer. If your packet has not been submitted, you will not be offered a hearing with FAB. While a hearing is not *required*, it is strongly encouraged, especially if your organization's budget is requesting significant changes. One incoming and one outgoing officer must attend this hearing. **Failure to keep your scheduled meeting time may result in financial penalization.**

Please note: FAB Packet Workshops will be held in late February/early March by the SGA Treasurer to aid organization Presidents and Treasurer's in the FAB process and how to fill out the paperwork necessary to participate in the FAB process.

Important Information

It is the sole responsibility of the organization to follow the allocation process correctly. **FAB reserves the right to reject or penalize any SGA funded organization for failure to provide a complete and thorough accounting of its request.**

- The SGA Treasurer is available to answer any questions about the allocation process.
- All forms and required material must be submitted to FAB by the SGA Treasurer's drop-off date.
- Upon review, FAB will create a budget proposal and submit it to the Student Government Association Joint Session, which will review and vote on the proposal before the end of the spring semester. Notification letters will follow this decision.

FINANCIAL ADVISORY BOARD (FAB)

FAB Financial Responsibilities

FAB has no set time limit to conduct investigations of any concerns relative to fiscal matters and reserves the right to notify the Dean of Students regarding any suspected improprieties.

Past reasons for suspension of funds include: misuse of funds, personal use of funds, misuse of phone, storing organizational equipment at off campus residences or in the residence halls, falsifying documents (e.g. forgery of signatures) and knowingly providing false information to the FAB. Spending that is inconsistent with an organization's purpose as stated in its constitution is prohibited. If you have any questions regarding the use of your funds you should contact the SGA Treasurer.

Appeal Process for FAB

If an organization feels that their budget was not given full consideration or that the amount it was allocated is not sufficient, the organization may appeal for more funds the following academic year. To appeal for additional funding, a representative of the organization must speak with the SGA Treasurer and Associate Dean of Students who will provide the information for appealing for more funds. The appeal must then be presented to SGA Joint Session. This body votes on any action.

APPEALING FOR ADDITIONAL FUNDS

While organizations are encouraged to use their allocated funds and seek out additional co-sponsorships from other organizations and departments, a need for greater funding arises from time to time. SGA recognized organizations may appeal for funds at any point during the year if the organizations meet the given criteria.

Who may appeal:

Only SGA recognized organizations, recognized campus chapter Greek organizations, and the EVVY awards receive funding from appeals. If individuals or groups who are not officially recognized SGA organizations wish to appeal, they must have an official SGA recognized organization be their sponsor and assume responsibility for the project.

In order to appeal for additional funds from SGA, the organization appealing must fund raise at least 10% of the amount appealing for.

- For example, if an organization is appealing for \$1,000 then \$100 must be raised.
- Co-sponsorships and transfers *specifically for the expense for which the organization is appealing* may be considered as fundraising.
- Funds raised specifically for the expense for which the organization is appealing that are not from the original funding allocation of the organization may be considered fundraising.
- In-kind donations (donations that are not money but can be given a monetary amount) used specifically for the expense for which the organization is appealing may be considered fundraising.
- Fundraising does NOT mean funds contributed from an organization from its original FAB budget allocation that were not specifically fund raised.

Treating appeals as a last resort:

Keep in mind that even if your organization decides to appeal, you are never guaranteed the amount you are appealing for. Therefore, it is beneficial and expected for your organization to treat the appeals process as a last resort.

First Resort: Reasonable Cost Cutting and Renegotiation where possible.

Second Resort: Co-sponsorships from departments and organizations.

Third Resort: Prioritizing and if applicable, re-prioritizing your Organization's budgeted funding allocation.

Fourth Resort: In-kind donations.

Fifth Resort: Independent Fundraising.

Sixth, Last, and Final Resort: **SGA appeal.**

APPEALING FOR ADDITIONAL FUNDS

Appeals Process:

1. You must contact the SGA Executive Treasurer at SGA_Treasurer@emerson.edu at **least four weeks prior to the date in which you need the funds in order to receive an appeals packet.** The appeals packet will include all pages which need to be returned, instructions for filling out the appeals packet including additional information that is needed to be attached, an appeals checklist to make sure you have everything before you appeal, and several pages relating to co-sponsorships, fundraising, and budgeting which will need to be filled out completely and returned to the SGA Executive Treasurer.
2. The organization must complete and return the appeals packet to the SGA Executive Treasurer at least **three weeks before the funds are needed.** This timeline *does not* include processing time for SGA paperwork such as Purchase Orders and Check Requests, so if applicable please take that processing time into consideration. If this guideline is not followed, funds are not guaranteed due to limited appeal hearings.
3. Once you submit the appeals packet to the SGA Treasurer for review, the SGA President and Treasurer will give you an appeals hearing date. This hearing will be during an SGA Joint Session meeting (*Tuesdays 2-3:45pm*). **Please note that the last day appeals will be heard is the second to last SGA meeting of the semester.**

Please keep in mind that appeals are subject to time constraints of Joint Session meetings. Every effort will be made for your organization to present their appeal on their scheduled date, but may be postponed based on time. All appeals will be heard on a first submitted basis.

4. Once your appeal has been received by the Executive Board, it will be forwarded to the Joint Session. If there are any inquiries regarding your appeal, you will be contacted by the SGA Treasurer.

If you have any questions, please do not hesitate to contact the SGA Treasurer at SGA_Treasurer@emerson.edu who will assist you in preparing your appeal, if necessary.

Appeal Judging Criteria:

Your appeal will be heard during an SGA Joint Session meeting on Tuesday between 2pm-3:45pm. You will be given a period to make your presentation for an appeal and then the Joint Session officials will ask you questions (called inquiries) and sometimes speak in favor or speak against your appeal. When judging appeals, SGA Joint Session officials operate under these guidelines, expectations and principles:

- **The appeal is financially responsible.**
- **The event/trip shows proof of planning ahead.**
- **Organization board and members have exhausted all other possible ways of getting additional funds.**
- **The event/trip benefits the college community outside of the people directly involved.**

FREQUENTLY ASKED QUESTIONS

Q: When will our organization have access to its SGA funds?

A: The organization Treasurer **and** President (or both Co-Presidents) must attend one of the Treasurer's Workshops in the Fall and your organization must Reactivate with the Office of Student Life before anyone can access the organization's account. The only exception allowed is for paying the table fee for the Orientation Organizational Fair. If leadership changes throughout the semester or at the beginning of the Spring Semester, additional Treasurer's workshops will be held at the discretion of the SGA Treasurer.

Q: Will we have money left over from last year's budget allocation?

A: No. At the beginning of each fiscal year on July 1, all remaining funds in organization accounts (including any funds raised) roll into the SGA Pool Account.

Q: Can someone donate or give money to our organization?

A: Yes. Anyone can specify where he/she would like a donation to the College to go. All donations must go through the College's Office of Institutional Advancement. However, in most instances, if donated funds are not spent in a given fiscal year, the funds will roll forward into the SGA pool account.

Q: How long does paperwork take to process?

A: There is a minimum five (5) day turnaround for most SGA financial paperwork. Allow additional time if signatures from other officials, such as the Dean of Students or President, are required.

Q: Why haven't I received my reimbursement?

A: On average, it takes a minimum of one (1) full week for a reimbursement to be reviewed and obtain the necessary signatures. If the SGA Treasurer is able to submit the Expense Report and Reimbursement Form to the Accounts Payable Office by 5p on Wednesday, the check should be available the following Friday. Factors that may delay this process include, but are not limited to, the availability of the Dean of Students and/or President for signatory purposes, incomplete or incorrect paperwork, lack of sufficient supporting documentation, or questionable justification for the reimbursement.

Q: How can my organization obtain additional funds from SGA?

A: Recognized SGA organizations may appeal to the Joint Session for additional funding. Please see the Appeals section or contact the SGA Treasurer for more information.

Q: What if I am able to obtain a better price for a product or service from a non-vendor?

A: Vendors are by definition businesses that have proven to be reliable and competitive in pricing, and will provide products and services upon receipt of a Purchase Order number as guarantee of payment. When a non-Emerson vendor is used, the payment process is much more complicated and time-consuming. If you obtain a quote from a non-Emerson vendor that is lower in price, contact the Office of Purchasing and Risk Management for assistance. They may be able to negotiate a comparable price from a vendor.

FREQUENTLY ASKED QUESTIONS

Q: How do I contact the SGA Treasurer?

A: The SGA Treasurer posts office hours (usually about five per week) each semester on the SGA office door. An email is also sent at the beginning of the semester to organization presidents and treasurers informing them of the SGA Treasurer's office hours. He/she will make every attempt to be present during these times. In rare instances, due to illness, business, or academic obligations, a session may be missed. In these cases, a note will be left on the door of the SGA office. In addition to office hours, the SGA Treasurer may be contacted by phone (x8686) or e-mail (SGA_Treasurer@emerson.edu). Additional contact information, if available, will be provided at the beginning of each semester. While the SGA Treasurer will make every effort to accommodate organization's needs, please keep in mind that he/she is also a student and needs to maintain an academic and personal life outside of SGA. Please utilize office hours, email, and voicemail as often as possible.

Q: What if I am unable to meet with the SGA Treasurer during office hours?

A: Contact the SGA Treasurer via telephone or e-mail. Explain your schedule conflict and make sure you mention your availability. The SGA Treasurer will make every effort to accommodate you.

Q: Can the SGA Treasurer sign paperwork before an organization President or Advisor?

A: No. Signatures must be obtained in the following order:

Organization President
Organization Treasurer
Organization Advisor
Associate Dean of Students
SGA Treasurer
Dean of Students (if over \$1000)
President (if over \$5000)

The Associate Dean of Students may sign for an organization Advisor with expressed written permission from the organization President and Advisor (email is acceptable).

Q: When does SGA meet?

A: SGA meets regularly on Tuesday afternoons at 2pm. Meeting locations will be posted weekly on the ECommon calendar.

WHAT DO I USE WHEN?

SGA paperwork can be confusing. The chart below aims to clarify when to use each form. If you have any questions, please contact the SGA Treasurer at SGA_Treasurer@emerson.edu.

	Purchase Order Requisition	Expense Report & Reimbursement	Consultant Payroll	Deposit	Check Request	Transfer Co-Sponsorship
<i>Services from an Emerson Vendor</i>	X					
<i>Cash Advance</i>					X	
<i>Reconciling Cash Advance</i>		X				
<i>Co-sponsorship</i>						X
<i>Deposit of Funds</i>				X		
<i>Reimburse-ments</i>		X				
<i>Payment for a non-Emerson vendor</i>					X	
<i>Payment to a non-Emerson Individual</i>			X			

DIRECTORY

SGA Office

Cami Bravo, SGA President
SGA_President@emerson.edu
Tau Zaman, SGA Vice-President
SGA_VicePresident@emerson.edu
Stefany Tomas, SGA Treasurer
SGA_Treasurer@emerson.edu
150 Boylston Street, Lower Level
tel: (617) 824-8686
fax: (617) 824-8394

Dean of Students Office

Ronald Ludman, Dean of Students
Michaela Spampinato, Assistant to the Dean
150 Boylston Street, 2nd Floor
tel: (617) 824-8640
fax: (617) 824-8599

Office of Student Life

Sharon Duffy, Associate Dean of Students
Steven Martin, Staff Assistant
Tikisha Morgan, Director of Multicultural Student Affairs
Elin Riggs, Assistant Director, Off Campus Student Services
Nicole Witkov-Rooney, Director of Student Activities
150 Boylston Street, 2nd Floor
tel: (617) 824-8637
fax: (617) 824-8937

Campus Center

Joshua Hamlin, Assistant Director
150 Boylston St, 1st Floor and Lower Level
tel: (617) 824-8680 / (617) 824-8684
fax: (617) 824-8937 / (617) 824-8089

Print•Copy Center

80 Boylston Street, 1st Floor
tel: (617) 824-8593
fax: (617) 570-0774

Information Technology

Bill Gilligan, Vice President
Neil Davin, Manager, Tech Support Services
180 Tremont Street, 4th Floor
tel: (617) 824-8080
fax: (617) 824-8081

Telecommunications

Hugh Gilbert, Manager
180 Tremont Street
tel: (617) 824-8585
fax: (617) 824-8081

Accounting Office

Irina Korogodsky, Supervisor
180 Tremont Street, 13th Floor
tel: (617) 824-8517
fax: (617) 824-7819

Office of Purchasing & Risk Management

Margaret Rogan, Director
Janel Wright, Assistant Director
Kath Duggan, Purchasing Agent
Ruth Perez, Purchasing Agent
180 Tremont Street, 13th Floor
tel: (617) 824-8590
fax: (617) 824-8589

Accounts Payable

April Jones, Director
Johanna Acevedo, Specialist
Vanessa Bloodworth, Clerk
180 Tremont Street, 14th Floor
tel: (617) 824-8520
fax: (617) 824-7819

Cashier

Sandy Lu, Cashier
180 Tremont Street, 13th Floor
tel: (617) 824-8518
fax: (617) 824-8589

Payroll Office

Linda Best, Coordinator
180 Tremont Street, 13th Floor
tel: (617) 824-8522
fax: (617) 824-8589

ARAMARK Catering Service

Casey Robinson, Catering Manager
80 Boylston Street, 1st Floor
tel: (617) 824-8060
tel: (617) 824-8065

Mailroom

Tom Doyle, Supervisor
100 Boylston Street, Lower Level
tel: (617) 824-8594
fax: (617) 824-8509

Media Center

Cheryl Schaffer, Head of Media Services
180 Tremont Street, 3rd Floor
tel: (617) 824-8676
fax: (617) 824-7839

Office of the Arts Emerson

Bonnie Baggesen, Arts Director
10 Boylston Place
tel: (617) 824-8363
fax: (617) 824-8799

TREASURER'S HANDBOOK

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Purchase Order Requisition Form

Please print all information and press hard. All information asked for is required.
You must attach a copy of the price quote that shows price detail.
You may email your price quotes to studentlife@emerson.edu,
This will NOT be processed without documentation.
Keep copies for your records.

Organization Name: _____ Account #: 0002-10-____-88600-99
 Student Contact: _____ Phone: _____ Email: _____
 Vendor Name: _____ Vendor Contact: _____
 Vendor Full Address: _____ Vendor Phone: _____
 _____ Vendor Email: _____

Item/Catalog Number	Specific Item Description	*Unit of Measure	Quantity	Purpose	Cost
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
*Unit of Measure Key: CTN = carton; YD= Yard; BOX= Box; CSE = Case; EA = Each; FT= Feet; ROL= Roll				Total: (Include Shipping/Discounts if Applicable)	

Note: A Trip Registration Form MUST be filed in the Office of Student Life prior to submitting a purchase order to cover trip expenses. A trip MUST be approved before funds are released.

President of Organization _____ Date _____
 Treasurer of Organization _____ Date _____
 Advisor of Organization _____ Date _____

**Turn in COMPLETED Form to the Associate Dean of Student's Mailbox in the
Office of Student Life on the second floor of 150 Boylston Street.**

SGA OFFICE ONLY BELOW THIS POINT

SGA Executive Treasurer _____ Date _____
 Associate Dean of Students _____ Date _____
 Entered into BANNER by _____ Date _____ R# _____ PO# _____ Overage R#:

White	Accounts Payable
Yellow	SGA Treasurer



Check Request

To be used for payment to a non-Emerson vendor

Please print all information and press hard. All information asked for is required.
Please also attach an invoice, contract, and completed W9.
This will NOT be processed without documentation. Keep copies for your records.

Organization: _____ Account #: 0002-10-_____-88600- 99
 Student Contact: _____ Phone: _____ Email: _____
 Please Pay: _____ Date: _____
 Payee's Full Address: _____ Payee's Phone: _____
 _____ Payee's Email: _____

Please Check One: Send Check Will Pick Up Check

Federal Tax ID Number: _____ Amount \$ _____

Specific and Detailed Description/Explanation of services or product:

**All Lines Below MUST be Signed by the Appropriate Person Listed*

President of Organization _____ Date _____
 Treasurer of Organization _____ Date _____
 Advisor of Organization _____ Date _____

Turn in COMPLETED Form to the Associate Dean of Student's Mailbox in the Office of Student Life on the second floor of 150 Boylston Street.

SGA OFFICE ONLY BELOW THIS POINT

Payee's Banner ID#: _____
 SGA Executive Treasurer _____ Date _____
 Associate Dean of Students _____ Date _____
 Dean of Students (For expenses over \$1000) _____ Date _____
 President (For expenses over \$5000) _____ Date _____

White	Accounts Payable
Yellow	SGA Treasurer



Consultant Payroll Form

To be used for payment to a non-Emerson individual

Please print all information and press hard. All information asked for is required.
Please also attach an invoice, contract, and completed W9.
This will NOT be processed without documentation. Keep copies for your records.

Organization: _____ Account #: 0002-10- ___ -88600- 99
 Student Contact: _____ Phone: _____ Email: _____
 Please Pay: _____ Date: _____
 Payee's Full Address: _____ Payee's Phone: _____
 _____ Payee's Email: _____

Please Check One: Send Check Will Pick Up Check

Social Security Number: _____ Amount \$ _____

Specific and Detailed Description/Explanation of services or product:

**All Lines Below MUST be Signed by the Appropriate Person Listed*

President of Organization _____ Date _____

Treasurer of Organization _____ Date _____

Advisor of Organization _____ Date _____

**Turn in COMPLETED Form to the Associate Dean of Student's Mailbox in the
 Office of Student Life on the second floor of 150 Bowdoin Street.**

SGA OFFICE ONLY BELOW THIS POINT

Payee's Banner ID#: _____

SGA Executive Treasurer _____ Date _____

Associate Dean of Students _____ Date _____

Dean of Students (For expenses over \$1000) _____ Date _____

President (For expenses over \$5000) _____ Date _____

White	Accounts Payable
Yellow	SGA Treasurer



Expense Report & Reimbursement Form

To reimburse a currently enrolled or employed Emerson student, faculty or staff with a Banner ID#.

Please print all information and press hard. All information asked for is required. Please also attach original receipts given for the expense, removing any taxes or tips from final reimbursement amount.
Please number each receipt submitted. Keep copies for your records.

Organization: _____ Account #: 0002-10-____-88600-99
 Student Contact: _____ Email: _____
 Please Pay: _____ Banner ID# _____ Date: _____
 Payee's Full Address: _____ Payee's Phone: _____
 _____ Payee's Email: _____

Please Check One: Send Check Will Pick Up Check

Checks may only be sent to off campus addresses.

Students in residence **MUST** pick up checks at the Student Service Center at 80 Boylston Street.

Date	Purchased From	Purpose and Receipt #	Amount	Date	Purchased From	Purpose and Receipt #	Amount
Attach original and detailed receipts. Summary receipts will NOT be accepted. A trip registration form must be on file before travel-related expenses are reimbursed. Do not include tax or tip in total.				Amount of Advance (if any)			
				Amount returned (if any)			
				Total Amount to be reimbursed			

All Lines Below MUST be Signed by the Appropriate Person Listed

President of Organization _____ Date _____
 Treasurer of Organization _____ Date _____
 Advisor of Organization _____ Date _____

Turn in COMPLETED Form to the Associate Dean of Student's Mailbox in the Office of Student Life on the second floor of 150 Boylston Street.

SGA OFFICE ONLY BELOW THIS POINT

SGA Executive Treasurer _____ Date _____
 Associate Dean of Students _____ Date _____
 Dean of Students (For expenses over \$1000) _____ Date _____

White	Accounts Payable
Yellow	SGA Treasurer



Deposit Form

To be used to deposit funds into your organization's account

**All checks should be made out to "Emerson College." Please print all information and press hard.
All information asked for is required. Keep copies for your records.**

Organization: _____ Account #: 0002-10-____-88600- 99
 Student Contact: _____ Phone: _____ Email: _____
 Amount Deposited: _____ \$ _____ Date: _____
(write out in words) (numerals)
 Description/Explanation/Name/Date of Event _____

Number of Deposit Forms submitted _____

TYPE OF PAYMENT	TOTAL
CASH	
CHECKS (List Payers Name AND Check Number)	
1)	
2)	
3)	
4)	
5)	
6)	
7)	
8)	
9)	
10)	
TOTAL DEPOSIT	

All Lines Below MUST be Signed by the Appropriate Person Listed

President of Organization _____ Date _____
 Treasurer of Organization _____ Date _____
 Advisor of Organization _____ Date _____
 Delivered by _____ Date _____

**Turn in COMPLETED Form and DEPOSIT ENVELOPE to the Associate Dean of Student's Mailbox
in the Office of Student Life on the second floor of 150 Boylston Street.**

SGA OFFICE ONLY BELOW THIS POINT

SGA Executive Treasurer _____ Date _____
 Associate Dean of Students _____ Date _____
 Delivered by _____ Date _____

White	Accounts Payable
Yellow	SGA Treasurer



Co-Sponsorship/Transfer Form

To be used for transferring funds from one SGA recognized organization to another SGA recognized organization. To be initiated and completed by the original sponsoring organization

Please print all information and press hard. All information asked for is required.
Transfers may only be made between SGA funded organizations and NOT to/from Academic departments. You MUST attach documentation outlining the expense in order for the transfer to be processed. Keep copies for your records.

Please Transfer: \$ _____ Date: _____

To: _____ Account #: 0002-10 - __ -88600- 99

From: _____ Account #: 0002-10 - __ -88600- 99

Student Contact: _____ Phone: _____ Email: _____

Specific Description/Explanation of why this co-sponsorship/transfer is needed and what this co-sponsorship/transfer is being used for: _____

**All Lines Below MUST be Signed by the Appropriate Person Listed*

President of Receiving Organization _____ Date _____

Treasurer of Receiving Organization _____ Date _____

President of Co-Sponsoring Organization _____ Date _____

Treasurer of Co-Sponsoring Organization _____ Date _____

Advisor of Co-Sponsoring Organization _____ Date _____

Turn in COMPLETED Form to the Associate Dean of Student's Mailbox in the Office of Student Life on the second floor of 150 Boylston Street.

SGA OFFICE ONLY BELOW THIS POINT

SGA Executive Treasurer _____ Date _____

Associate Dean of Students _____ Date _____

Dean of Students (For expenses over \$1000) _____ Date _____

White	Accounts Payable
Yellow	SGA Treasurer



Staples Order Form

Please submit completed order form electronically to
SGA Treasurer@emerson.edu and at Sharon.Duffy@emerson.edu.

Organization: _____ Account #: 0002-10-____-88600-99

Student Contact: _____

Email: _____

Item Number	Qty	U/M	Description	Price
<i>520064</i>	<i>3</i>	<i>EA</i>	<i>Binder View 1"-White</i>	<i>\$2.19 each</i>



EMERSON COLLEGE

Trip Registration Form

This form is to be completed by the sponsoring academic department, sponsoring faculty or sponsoring student organization.

This form must be returned to the Office of Student Life, 150 Boylston St., no later than 10 business days prior to the trip.

It is advised that you meet with the Associate Dean of Students at least 3 weeks prior to the trip to discuss travel plans and policies.

Please refer to pg. 148 of the Undergraduate Student Handbook for details on the Student Organization Sponsored Trip Policy

Please note that only full-time students, in good academic and social standing may participate in College sponsored trips.

Organization Name: _____

Contact Name: _____

Contact Phone Number and E-mail: _____

TRIP INFO

Trip Location: _____ Trip Purpose: _____

Departure Date: _____ Departure Time: _____ Return Date: _____ Return Time: _____

Site Address: _____

Site Phone Number: _____

Please circle all that apply: Overnight Trip Day Trip Film Shoot Class Activity

Number of Participants: _____

TRAVEL INFO

Travel Agency/Tour Operator (if used): _____

Agency Contact and Phone Number: _____

Travel Methods (check all that apply): Flight _____ Bus _____ Train _____ Car _____ Rental _____

Please note: All final travel arrangements are to be submitted to the Office of Student Life no later than 5 business days before the start of the intended trip. Flight itineraries are required for all members of the Emerson Community traveling via airlines to take part in the trip.

Car Rental Company (if used): _____

Car owner's name, make and model of car, and license plate number: _____

HOTEL INFO

Hotel / Lodging: _____

Hotel / Lodging Address: _____

Contact Number of Hotel / Lodging: _____

FILM SHOOTS

For all film shoots, we request a copy of an approved TRF form be attached to this form.

(Forms are available by contacting the TRF Office at x8978). Please attach approved TRF form.

Advisor(s) Attending: _____

Advisor's Signature: _____

Date of Advisor's Signature: _____

Additional Details: _____

Please submit Assumption of Risk and Release forms for each individual attending the trip.

Only one Trip Registration form per trip is necessary.

Only legible original copies, pdf's, scans, or faxed versions of this form will be accepted. Pictures of a completed form are not acceptable.

Student Life Use

TRF Form Attached: _____ Travel Itineraries Received: _____ R&R Forms Received: _____



EMERSON COLLEGE

Assumption of Risk and Release: Field Trips and Off-Campus Activities

This form is to be fully completed by all participating students, faculty advisors, or staff.

This form is to be returned to the Office of Student Life, 150 Boylston Street, no later than five (5) business days prior to the trip.

This form will be maintained on file within the Office of Student Life.

Please note that only full-time students, in good academic and social standing may participate in College sponsored events.

This release is executed by _____ to Emerson College, Boston, MA. In
(Participant's Name)
consideration of being permitted to participate in _____, I, the undersigned, am in full
(Activity)
recognition and in appreciation of the dangers and hazards inherent in this activity and during transportation to and from
Boston, MA, and _____ beginning on _____ through _____, 20_____
(Location) (Date) (Date) (Year)

I hereby agree to assume all the risks and responsibilities surrounding my participation in this activity or any activities undertaken as an adjunct thereto; and further, I do release, and forever discharge Emerson College, the Student Government Association, the Residence Hall Association and all of its officers, agents, and employees from and against any and all claims, demands and actions, or causes of action, on account of damage to personal property, or personal injury, or death which may result from my participation, and which result from causes beyond the control of and without the fault or negligence of Emerson College, the Student Government Association, the Residence Hall Association, its officers, agents, or employees, during my participation as aforesaid; I also hereby understand that only full-time students, faculty, and staff are eligible to attend College-sponsored field trips and are eligible to be covered under the College's umbrella insurance policy;

By submitting this form, I authorize the Office of Student Life to run both disciplinary and academic checks to verify my good standing with Emerson College. If I am deemed ineligible and/or do not meet the GPA requirements, I will be notified and will be unable to attend/participate. Trip participants are financially responsible for all funds expended on their behalf in the event of their cancellation or subsequent ineligibility per College policy. * (2010-2011 Undergraduate Student Handbook, page 148).

Insurance Carrier/Provider: _____ Coverage Date: _____
Policy Number/Holder: _____
Coverage(full,emergency, etc.): _____

In witness whereof, I have read and understand the above statement. _____
(Student Signature)

I cause this release to be executed on _____ and I intend to be legally bound hereby.
(Date)

(Student Email Address) (Emerson ID Number) (Student's Phone Number)

(Parent Signature - if student is less than 18 years of age)

*In case of an emergency, please contact:
Name: _____ Relationship: _____
Address: _____
Phone: _____

*Names and contact numbers will be provided to the Dept. of Public Safety 24 hrs prior to departure of trip in case of emergency.

Only original copies, pdf's, scans, or faxed versions of this form will be accepted. Pictures of a completed form are not acceptable.


EMERSON COLLEGE
Fundraising / Solicitation Application

*Please note that only recognized and funded Emerson College student organizations/departments may fundraise.
 All funds collected must be deposited into an Emerson College account for processing.*

- *On-campus* fundraising includes sollicitating donations, charging an entrance fee to an event or activity, conducting authorized raffles, and the selling of goods/services/tickets. *Off-campus* fundraising activities include solliciting merchants, foundations, corporations, parents or alumni for contributions in and of themselves, or in return for an advertisement or service.
- **Please note: Running a raffle requires a permit from the City of Boston. Please see the "Fundraising Activities" and "Gambling" sections of the 2010-2011 Undergraduate Student Handbook (page 129) for further details.**
- This application must be completed, regardless of whether the money/goods/service is to benefit an Emerson College student organization/department or an outside charitable agency.
- Applications must be submitted no later than 5 business days in advance of the proposed event to the Office of Student Life, 2nd Floor, 150 Boylston Street. Contact 617-824-8637 with any questions!

Event Details

Organization: _____ Today's Date: _____
 Date of event: _____ Time of event: _____ Location: _____
 Amount Charged \$ _____ Purpose: _____

Please describe the event:

Name of outside vendor or sponsor (if applicable): _____

Recipient(s) of Funds (if a student organization, please list name of organization and account number):

Please check ALL groups that will be sollicited:

Students: _____ Parents: _____ Faculty/Staff: _____ Alumni: _____

Other (describe): _____

The following signatures are required, in the order listed below:

1. _____	_____	_____
Signature of Person in Charge of Fundraiser	Phone and email:	Date:
2. _____	_____	_____
Signature of Organization President/Chairperson	Phone and email:	Date:
3. _____	_____	_____
Signature of Organization Advisor	Phone and email:	Date:

-----Do Not Write Below This Line-----

Approved: _____ Denied: _____ Comments: _____

Associate Dean of Students Date

ENTERTAINER AGREEMENT

The following will serve as an agreement (contract) between _____ (name of organization or department) _____ (name and full address) as “Entertainer” and Emerson College, hereinafter the “Client.”

TERMS

- 1) The Entertainer will provide a presentation/service for the Client’s _____ (name of event) on _____ (day of week), _____ (month and date), 2010.
- 2) The entertainer will arrive for set-up at (time) _____.
- 3) The entertainer will provide a presentation/service from (time) _____.
The entertainer will break-down from (time) _____.
- 4) The time allotted includes set-up and take down of equipment.
- 5) The entertainer will be providing the following service(s) _____
_____.

LOCATION

The Client’s event will be held at the Emerson College’s _____ (specify room, room location and address).

EQUIPMENT

The Client will/will not (circle one) provide media equipment. _____ (specify equipment or attach a contract RIDER – see ADDITIONAL REQUIREMENTS) will be provided by the Client/Entertainer (circle one). The Client shall not be held accountable for any lost, stolen or damaged items.

THIRD PARTY MATERIAL

If the Entertainer’s presentation contains any software code, images, graphics, text or other material not created solely by Entertainer (collectively, “Third-Party Material”), Entertainer will identify all Third-Party Material in writing, on a Rider to be attached to this contract. Entertainer agrees to, at its sole expense, obtain appropriate written permission of the copyright holder, where necessary, to use the Third-Party Material in connection with the presentation before services are rendered.

ADDITIONAL REQUIREMENTS

Please attach a detailed contract **RIDER** if additional requirements are expected. A RIDER specifying additional requirements/requests (circle one) is/is not attached.

COMPENSATION

The Client will pay the Entertainer \$ _____ (specify amount) for all components of the package. The Client will make full payment via College check within twenty-one days after services are rendered. Entertainer must provide a completed W9 and provide a certificate of liability insurance or sign an “Emerson College Liability Release, Waiver, Discharge and Covenant Not to Sue” form upon signing on this contract BEFORE services are rendered. Failure to provide these materials will render this contract null and void, the Entertainer will not be authorized to provide services and Emerson College will not provide payment in full or in part.

Pursuant to Massachusetts law, Client shall withhold all applicable taxes, including without limitation performing entity taxes, on all payments due to Artist. At Client’s discretion, Client may choose to withhold from each individual payment or to withhold entire amounts due from the final payment.

CANCELLATION

In the event of a cancellation due to circumstances beyond either the Entertainer’s or Client’s control, both parties will work to find a mutually convenient date to reschedule. If both parties cannot agree on a mutually convenient date, or if rescheduling the event would frustrate the purpose of the agreement, the agreement will be considered null and void with each party being responsible for their own expenses that may have been incurred.

INDEMNIFICATION

Entertainer agrees to indemnify, defend, and hold harmless Client, its Board of Trustees, affiliates, officers, agents, students, and employees from and against any and all claims, suits, actions, demands, damages, judgments, losses, liabilities, expenses, and costs (including, but not limited to, court and arbitration costs and reasonable attorney fees), which may arise from or relate to any actual or alleged breach of this Agreement or which may arise from or relate to Client’s performance of the services, except to the extent such are caused by the sole fault or negligence of Client.

If the Terms and Conditions of this agreement meet your approval, please sign and return this original document only.

Entertainer Signature

Dr. Ron Ludman, Dean of Students
Emerson College
120 Boylston Street
Boston, MA 02116

Entertainer (Print Name)

Tax ID #

Date

Entertainer Full Address

Date



EMERSON COLLEGE

LIABILITY RELEASE, WAIVER, DISCHARGE AND COVENANT NOT TO SUE

Name of Department/Student Organization: _____

Date, Time and Location of Service: _____

Type/Nature of Service: _____

1. I, _____, an individual with an address _____ desire to provide speaker and related services for Emerson College, with an address at 120 Boylston Street, Boston, Massachusetts 02116, as described in the Contract (the "Contract") between Emerson College and _____ (the "Services"). In consideration of the Contract, I agree to the terms of this liability release, waiver, discharge, and covenant not to sue.

2. I understand that Emerson College is not responsible or liable for any loss, property damage, or personal injury I may incur as a result of providing the Services, and knowing the risks involved in providing the Services, I agree to assume all the risks surrounding my provision of the Services.

3. I forever release, waive, discharge, and covenant not to sue Emerson College, its Board of Trustees, officers, agents, employees, and students (hereafter called the "Releasees"), from and against any and all liability for any harm, injury, damages, claims, demands, actions, causes of action, costs, and expenses of any nature, that I may have or that may hereafter accrue to me, arising out of or related to any loss, damage, or injury, including, but not limited to, suffering and death, that may be sustained by me or my property, whether caused by the negligence or carelessness of the Releasees, or otherwise, while providing the Services. In other words, I agree that I cannot sue or recover anything from Releasees if anything happens to me or to my property as a result of Releasees' past or future negligence or as a result of my provision of the Services or any event related to my provision of the Services.

4. It is my express intent that this Release shall bind the members of my family and spouse, and my estate, family, heirs, administrators, personal representatives, or assigns, and shall be deemed as a "Release, Waiver, Discharge and Covenant" not to sue the above-named Releasees. I further agree to hold harmless, indemnify, and defend Releasees from any claim by me or my family, arising out of my provision of the Services, other than claims for nonpayment of the contract Terms.

5. In signing this Release, I acknowledge and represent that I have fully informed myself of the content of this Release by reading it before I sign it, and I understand that I sign this document as my own free act and deed; no oral representations, statements, or inducements, apart from the foregoing written statement, have been made. I understand that Emerson College does not require me to provide the Services, but I desire to do so. I further state that I am at least eighteen (18) years of age and fully competent to sign this Release; and that I execute this Release for full, adequate, and complete consideration fully intending to be bound by the same.

6. I agree that this Release shall be construed in accordance with the laws of the Commonwealth of Massachusetts. If any term or provision of this Release shall be held illegal, unenforceable, or in conflict with any law governing this Release, the validity of the remaining portions shall not be affected thereby.

THIS IS A RELEASE OF LEGAL RIGHTS. READ AND BE CERTAIN YOU UNDERSTAND IT BEFORE SIGNING.

Print Name of Vendor _____

Signature of Vendor _____

Date of signature _____

**Request for Taxpayer
Identification Number and Certification**

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

Print or type
See specific instructions on page 2.

Name (as reported on your income tax return)	
Business name, if different from above	
Check appropriate box: <input type="checkbox"/> Individual/ Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Other ▶	
<input type="checkbox"/> Exempt from backup withholding	
Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
City, state, and ZIP code	
List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

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

Social security number
or
Employer identification number

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

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. person (including a U.S. resident alien).

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

Sign Here	Signature of U.S. person ▶	Date ▶

Purpose of Form

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

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

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee.

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

For federal tax purposes you are considered a person if you are:

- an individual who is a citizen or resident of the United States,
- a partnership, corporation, company, or association created or organized in the United States or under the laws of the United States, or

- any estate (other than a foreign estate) or trust. See Regulation section 301.7701-6(a) for additional information.

Foreign person. If you are a foreign person, use the appropriate Form W-8 (see Publication 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the recipient has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement that specifies the following five items:

- The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
- The treaty article addressing the income.
- The article number (or location) in the tax treaty that contains the saving clause and its exceptions.