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Alumni Association

# Chapters and Clubs Policy and Resource Guide

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# INTRODUCTION

## PURPOSE

The Fresno State Alumni Association (FSAA) grants status as an official alumni and friends chapter or club. Official recognition from the FSAA is required to ensure that all interested alumni and friends have ongoing access to the services, benefits and support provided by the FSAA. In turn, this strengthens the overall FSAA in its three value points: Engagement, Scholarship and Recognition.

The purpose of all FSAA alumni and friend's chapters and clubs is to:

1. Establish closer contact between Fresno State and its alumni.
2. Promote the goals and purposes of the University and the department/program/unit they seek to represent.
3. Promote activities that directly benefit alumni and Fresno State
  - a. In the case of chapters and clubs who represent campus-based departments/programs/units, in addition to goals that meet the needs and interests of alumni, goals and activities of the chapter/club should also be in alignment with those of the campus unit.
4. Raise money to support a campus-based need. This can include establishing an endowed scholarship, supporting an already existing endowed scholarship under the FSAA, or supporting a program/department/unit on campus.

## OVERSIGHT AND GOVERNANCE

Consistent with the FSAA's Memorandum of Agreement with Fresno State, the FSAA is the sole entity granted the ability to recognize alumni constituency groups and provide them the privileges thereof. All alumni constituency groups are under the supervision of the FSAA and subject to the policies and procedures of the FSAA, its constitution and bylaws, and Fresno State. Since they are under the purview of the FSAA, chapters and clubs do not create or manage their own bylaws.

All Chapters and Clubs are non-dues based. They do not require any payment to join.

## TERMS AND DEFINITIONS

**Board:** In addition to the four officer positions, Chapters and Clubs have the option of developing a larger board. A board is developed at the discretion of the Chapter or Club. It is not a requirement. FSAA staff are available to the officers of Chapters or Clubs should they wish to discuss when the development of a board may be considered.

**Cash:** The term “cash” as used in this Handbook refers to U.S. currency and coin, checks drawn on U.S. banks and written in U.S. dollar values, including travelers, cashiers and certified checks; plus money orders and credit card sales drafts. The forms of currency mentioned above are acceptable forms of payments to the FSAA.

**Chapter:** An FSAA Chapter is an official and formal group of alumni and friends that has formed a bond around a Fresno State academic-based school, college or department. The Chapter has obtained academic acknowledgement from the relevant dean, or their designee, and the approval of the FSAA Board of Directors, affirming their commitment to maintain the requirements for Chapter recognition as described in the policies and procedures contained in this resource guide. Chapters hold official meetings, as well as various fundraising events and activities that typically support its student scholarship endowment fund.

**Club:** An FSAA Club is an official group of alumni and friends that has formed a bond around a non-academic-based theme or a special interest. The Club has obtained acknowledgement from the relevant campus entity (director, advisor, dean, staff member, etc.), and the approval of the FSAA Board of Directors. With the approval of the FSAA, the Club has made a commitment to maintain the requirements for Club recognition as described in the policies and procedures contained in this resource guide.

**Officers:** Officers are the individuals elected to fill one of five positions: President, Vice President, Secretary, Treasurer, and Campus Liaison. The individuals holding these positions are voted on by the attendees of the Chapter/Club on an annual basis. Combined, these individuals are referred to as the Chapters/Clubs “Executive Committee.”

**Volunteers:** Defined as individuals or groups that provide their time and talent, without pay, to Fresno State, FSAA, Chapters, Clubs, or Networks. The individuals and groups voluntarily undertake or express a willingness to provide some sort of service.

**Notes:**

1. When more relevant or beneficial, additional definitions are provided throughout this policy and resource guide where most beneficial.
2. Note: For purposes of simplicity, in this handbook Chapters and Clubs are collectively referred to as “CC’s.”

# STARTING A CHAPTER OR CLUB

## APPLICATION PROCESS

1. Any group of individuals may start an alumni and friends chapter or club by meeting the standard requirements.
  - a. If a chapter/club *already exists* that represents the same/part of the same constituency group, the leadership of the proposed *new CC* must meet with the leadership of the other CC.
    - i. Example: The Craig School of Business Alumni and Friends Chapter has existed since 2003. A group of alumni from the Marketing Department wish to start a Marketing Chapter. The group must first meet with the leadership of the Craig School of Business Chapter to discuss their proposal.
2. Complete and submit the “New Chapter or Club” application to the appropriate FSAA staff member.
3. Once submitted a meeting will be scheduled to review the information. All leadership of the proposed new chapter or club must participate in the meeting(s) with FSAA staff.
  - a. Other individuals who wish to support the chapter/club, but who are not part of the leadership team, may also join the meetings.
4. The purpose of the meetings is to:
  - a. Review the application to ensure all information has been completed fully and accurately.
  - b. Enable FSAA staff to fully educate and inform individuals of the purpose of chapters/clubs, and ensure alignment with the strategic plan and goals of the FSAA.
  - c. Answer any and all questions individuals may have about the FSAA, its policies and procedures, operational questions about chapters/clubs, best practices, start-up strategies, etc.
5. Approval process
  - a. Once the FSAA staff member has reviewed and approved the “New Chapter or Club” application and “Annual Renewal Packet”, they will submit to the Engagement Committee (a sub-committee of the FSAA’s Board of Directors).
  - b. The Engagement Committee will review and recommend for approval by the Executive Committee.
  - c. Upon approval by the Executive Committee, the proposal will be approved by the entire FSAA Board of Directors at the next Board of Directors meeting. These meetings are held on a quarterly basis.
6. After the chapter/club is approved:
  - a. Chapter/Club leadership will be notified.
  - b. The FSAA will create an account for any financial holdings.

- c. An official chapter/club logo will be created and provided to the designated leadership.
- d. A meeting will be scheduled between relevant FSAA staff and the leadership to go over any additional/final details.
- e. The new chapter/club will be announced at the next soonest FSAA Chapter/Club Leadership meeting (held three times each year).

## **NAMING THE CHAPTER OR CLUB**

### **1. Chapters**

- a. As a chapter is an academically-based group, the name of the chapter must correspond with an active college or major at Fresno State.
  - i. Example: Major - Media Communications and Journalism Alumni and Friends Chapter
  - ii. Example: College – Craig School of Business Alumni and Friends Chapter
- b. The names of chapters (and clubs) follow the same naming pattern.
- c. If a chapter for a specific major is being proposed, and a chapter that represents the college that major is under already exists, the individuals proposing the chapter must meet with both the appropriate FSAA staff, as well as the current leadership of that chapter.
  - i. Example: Finance (which is under the Craig School of Business) wish to start an “Alumni and Friends Finance Chapter”. There is already a chapter in existence for the business college, the “Craig School of Business Alumni and Friends Chapter.” The individuals proposing the Finance Chapter must meet with the leadership of the CSB Alumni and Friends Chapter and obtain their approval to start a new chapter.

### **2. Clubs**

- a. As a club is a group of alumni coming together around a non-academic-based-theme or interest, that club must find its most relevant counterpart in a campus-based constituency group.

# CHAPTER/CLUB LEADERSHIP STRUCTURE

## CHAPTER/CLUB OFFICERS

All CC's are required to have all officer positions filled on an annual basis. These positions make up a CC's Executive Committee. Each position must be filled by a unique individual. One person may not serve in multiple positions (i.e. serve as President and Treasurer). After all required positions are filled, CC's have the option of developing a board. Below is a list of all required positions and their associated roles.

## OFFICER ELIGIBILITY

Consistent with the FSAA's "all-comers" policy, participation as an officer of a CC is open to:

1. Alumni
2. Alumni non-grads
3. Friends of Fresno State (non-alumni; supporters of Fresno State)

## OFFICERS: POSITIONS AND ROLES

1. President
  - a. The President shall preside at all the meetings of the CC and its Executive Committee.
  - b. The President shall make committee appointments and shall be a non-voting member of all committees.
  - c. The President will lead the overall operations and programs of the CC and will serve as the primary contact and work directly with the FSAA.
  - d. The President is responsible to ensure all annual review materials are submitted to the FSAA by the deadline established each year.
  - e. The President will attend the fall and spring FSAA Chapter/Club leadership meetings, along with any/all other officers.
2. Vice President
  - a. The Vice President shall assume the duties of the President in the absence of that officer, and shall render assistance in the performance of the business of the chapter.
  - b. The Vice President shall chair at least one of the standing committees of the chapter.
  - c. The Vice President will attend the fall and spring FSAA Chapter/Club leadership meetings, along with any/all other officers.
3. Secretary
  - a. The Secretary will keep an accurate account of the activities of the chapter/club, including business meetings.

- b. The Secretary shall also act as Historian.
  - c. The Secretary shall maintain a record of the Chapter's Executive Committee, with contact information including home and work addresses, emails, and phone numbers; and ensure that an up-to-date Executive Committee list is on file with the FSAA.
  - d. The Secretary will attend the fall and spring FSAA Chapter/Club leadership meetings, along with any/all other officers.
4. Treasurer
- a. The Treasurer shall keep an accurate account of all financial transactions of the chapter/club; and shall report on these matters at all general meetings and Executive Committee meetings.
  - b. In conjunction with the President, the Treasurer shall prepare a detailed annual report of financial activity from July 1 to June 30 of each fiscal year and submit it to the Chapter's Executive Committee and the FSAA by June 30 of each year.
  - c. The Treasurer shall collect and deposit monies from any special events and fundraisers in accordance with the policies and procedures established by the FSAA.
  - d. The Treasurer will attend the fall and spring FSAA Chapter/Club leadership meetings, along with any/all other officers.
5. Campus Liaison
- a. This position *must* be filled by a Fresno State staff or faculty member.
  - b. The Campus Liaison *must* work in the division/department/college/unit that the CC represents, or otherwise maintain a significant and relevant connection to the constituency group(s) on campus that the alumni CC represents.
  - c. The Campus Liaison will serve as the on-campus advocate for the CC, serving as a "connecting point" between the alumni CC, and the campus.
  - d. They will attend all meetings of the Executive Committee.
  - e. The Campus Liaison is a non-voting member of the Executive Committee.

## DEVELOPING A BOARD

To help ensure representative leadership, sustainability and succession planning, CC's can develop representative boards. The FSAA can provide guidance on developing your board. Below are some suggestions.

1. Academic/Degree representation: If a chapter of a college, create one board position for each major within the college, ensuring an alumna/s serves from each of these areas.
2. Student representation: To help ensure connections to students, and to help create awareness among students of the alumni CC, create a position for a current undergraduate student. Consider reaching out to student clubs and organizations, and the college/department/program to identify student leaders who would be suitable for this position.

3. Faculty/Staff: Active participation from faculty and staff helps ensure connections to the campus, and representation of the CC to campus groups. At a minimum, this position is accounted for by the Campus Liaison. *Additional* positions can be created at the discretion of the CC leadership and with input and direction from the FSAA and the academic area the chapter represents. Consider reaching out to the Dean, Department Chair, or other relevant faculty or staff position for recommendations on who this person could be.
4. Professional Development: As many CC's seek to connect with students for the purposes of professional development, mentoring, interning, etc., to the benefit of students as well as alumni, a position on your board whose responsibility it is to connect with career/professional development staff in the college/department/program, or the Career Development Center is recommended.
5. Ex-officer or board members: For officers and/or board members who have rotated off the Executive Team or board, and in order to help in the transition to new leadership, CC's can consider creating a group for these individuals. The alumni association can provide suggestions and assistance on creating and naming this group of people.

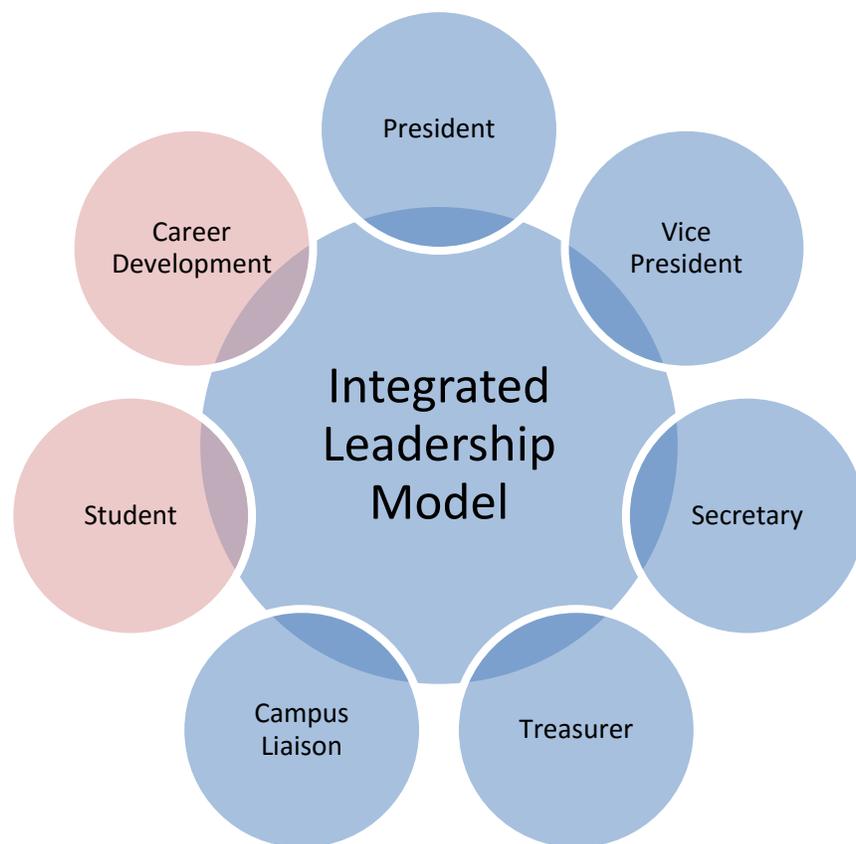


Figure 1 Integrated Chapter/Club Leadership Model.  
Circles in blue are required positions, circles in red are optional.

## TERMS OF OFFICE AND TERM LIMITS

The criteria below apply equally to officer and board positions.

1. All officers and/or board members shall be elected to serve a two (2) year term for any one position.
  - a. Exception for inaugural elections: The terms of officer shall be staggered during the inaugural election.
    - i. Offices of President and Vice President shall be elected for a two-year term.
    - ii. Secretary and Treasurer shall be elected for a one-year term.
    - iii. In each succeeding election, officers shall be elected to two-year terms.
2. Should an opportunity arise within a two-year term to move into another position, that individual may do so. If they move into another position, their two-year term will reset.
3. No individual may serve in *one* single position for more than three (3) consecutive terms, or six years.
4. After a *total* of six years of service, whether in multiple positions or one position, the individual must take one year off of service on the Executive Committee.
  - a. If the CC has a board, the individual may be elected to a position on the board. Otherwise, the individual must take at least one year off before again being eligible for an officer position.
5. Vacancies in any office may be filled by Presidential appointment from active participants of the CC's board, known prior event attendance, or other significant participation in the CC, for the unexpired portion of the vacant term.
6. Any officer may be removed, either with or without cause, by written ballot with a two-thirds (2/3) majority of the rest of the officers responding.
  - a. Prior to removal, the FSAA must be notified by the officers to be informed of the situation and reason for removal.
7. An officer may resign at any time by written notice to the officers and FSAA. Any such resignation shall take effect upon receipt of such notice or at any later time specified therein.

## ADDITIONAL ROLES TO CONSIDER

In addition to the roles and responsibilities of officers, it is recommended to assign to officers and/or board members to the functions below:

1. Event planning: Due to the complex and involved nature of event planning, it is recommended that this be a shared responsibility. As most events involve fundraising and/or financial transactions, the Treasurer should be actively involved with all event planning. An additional officer or board member should be assigned to this area.

2. Social media/communications: Identify one individual in the CC to be responsible to manage the CC's social media presence. The FSAA will create relevant social media channels for each CC (see "Communication and social media" section below).
3. Liaison to campus stakeholders: Especially for clubs, if the CC has student organizations on campus that represent their interests as alumni, identify one officer/board member to maintain active communications with those groups. If a board position exists for a current undergraduate student, this role is likely filled by this board position. This position would be in addition to the required Campus Liaison position that participates as a member of the CC's Executive Team.
4. Sub-committees: Depending on the nature of your CC's annual activities, consider establishing sub-committees. Sub-committees are an effective way to assign specific individuals to a set scope of tasks, helping to ensure those tasks are performed. They are also a good way to involve others in your CC who are not an officer or sit on your board. They are a good way to recruit others for future leadership opportunities. Examples of when a sub-committee may be helpful include planning an event, or in managing your endowed scholarship (i.e. these individuals would review applications, interview candidates, etc.)

## **RECOGNITION AND ANNUAL RENEWAL REQUIREMENTS**

During the initial creation of a CC, and during the annual renewal period thereafter, in order to be recognized by the FSAA Board of Directors, all CC's shall meet the following requirements:

1. Eligibility
  - a. All alumni, graduates, friends, faculty, staff of the geographic, academic, or special interest group must be eligible to participate.
2. Officers
  - a. All required officer positions must be filled.
3. Acknowledgement of representation
  - a. The Dean/Department Chair/Staff designee or other Fresno State faculty or staff must sign the Acknowledgement Form, recognizing that the CC exists and represents alumni and supporters of the given constituency group for which the Dean/Designee/Staff or faculty member is involved with on the Fresno State campus.
  - b. This individual may *not* be the CC Campus Liaison.
4. Additional documentation
  - a. Authorized signers on the CC account.
  - b. List of planned meetings and events for the upcoming fiscal year (July 1- June 30).

## **COMMUNICATIONS, SOCIAL MEDIA AND DATA PRACTICES**

Once officially recognized by the FSAA the CC must adhere to the following:

1. Abide by the FSAA and Fresno State's policies and procedures regarding communication, including, but not limited to, websites, social media, email marketing.
2. Ensure that all information about alumni is stored in Fresno State's alumni and donor database.
3. Refer to the [FSAA Communication Policy](#) for additional details.

# FINANCIAL PRACTICES

All policies and procedures explained in the following sections apply equally to CC's. CC's are responsible for all of the financial commitments and obligations each incurs.

## GENERAL FINANCIAL PRACTICES

1. All cash management, disbursement and accounting services shall be handled by the FSAA.
2. CC's do not possess the authority to establish their own, separate bank account.
3. All monetary gifts, in-kind donations, and sponsorships must be tracked and processed through the FSAA for deposit into the appropriate account, and for official Fresno State reporting and acknowledgement.
  - a. For donations, the FSAA will send a letter acknowledging the gift to the donor for tax purposes.

## REQUESTS FOR FINANCIAL REPORTS

1. Only individuals who are authorized signers on the chapter/club account will be provided financial reports.
2. Financial reports will be available upon request starting on the **last Monday of each month**.
3. The financial report provided will reflect the most up to date financials for the previous month. For example, if you requested a financial in February, we will be able to send you the most up to date as of January 31<sup>st</sup>.
4. Once financial reports have been requested, please allow five business days for processing (e.g., request received Tuesday, reports would be provided by 5:00 p.m. next Tuesday).
5. We now have the capability to provide for direct deposit of reimbursements. When submitting reimbursements please let our staff know if you are interested in learning more about this option. In addition, you will need to provide us with your email address.

## USE OF SQUARE TO COLLECT PAYMENTS FOR EVENTS

1. Major credit cards accepted: American Express, Discover, MasterCard, VISA.
2. Use of Square is required to process any payments taken at an event.
3. Please complete the [Square Request Form](#) and submit to the appropriate FSAA staff member.
4. Training of Square is required before use.
  - a. Based on the [Square Request Form](#), the appropriate FSAA staff member will work with the Treasurer to determine the types of payments that will be accepted. Once this is determined, any specific payments will be created in Square, helping to ensure ease of use.

5. With advance notice, the FSAA will provide the Treasurer, or their designee, with the square reader.
6. The CC representative will be provided administrative access to the FSAA's Square account so they can login/use Square.
7. There must be two people operating the Square at all times as a system of checks and balances.
8. You must print and post (i.e. place at the check-in table) the [How Proceeds will be Used Info Sheet](#) at all locations where you are accepting payments. This statement will also be included on all online registration forms.
9. Square equipment must be signed out and returned to the FSAA within 48 hours of the event.
10. After the event, a financial report will be generated and provided to the Treasurer.
11. The Treasurer is responsible to reconcile all of the payments they collect, whether that be through credit card, check, and/or cash.
  - a. Use the [Alumni Chapter Deposit Forms](#).
12. The FSAA pays all administrative fee's issued by Square, and the transaction/processing fee charged by Square. This enables the CC to receive 100% of the funds processed through Square.

## **REIMBURSEMENT AND PAYMENT POLICY**

In order to maintain proper accounting records with the FSAA, all recognized CC's shall adhere to the following reimbursement and payment processes.

1. Use of funds
  - a. Monies should be used for the purpose of promoting events, programs and fundraisers, workshops, reunions and other related activities that provide an explicit benefit to the CC and the campus.
  - b. Event-related marketing *may not* have explicit messaging that tells the consumer that proceeds will go toward the CC's scholarship. The night of the event, you are required to print and place the [How Proceeds Will be Used Info Sheet](#) for all marketing and fundraising efforts.
  - c. All monies will be placed in the CC operating account.
  - d. After monies are initially deposited into the operating account, authorized signers may submit a request for monies to be transferred to their scholarship fund/endowment. To request a transfer of funds, you must complete the [Transfer of Funds Request](#) form.
2. Authorized signatures
  - a. Active CC's shall have on file with the FSAA an authorized signature sheet.

- i. The sheet provides instructions to the FSAA on who has permission on behalf of the CC to request funds, make reimbursements or issue payments.
  - b. An authorized signature form is valid for a fiscal year (July 1<sup>st</sup> - June 30<sup>th</sup>).
  - c. Expenses and outstanding invoices are processed by the FSAA for payment.
    - i. Only authorized signers on a CC account are able to sign and complete all required paperwork submitted to the FSAA for review and processing.
- 3. Request for reimbursement or payment
  - a. All active CC's must complete and submit the [Payment or Reimbursement Form](#) for all reimbursements and/or payments.
  - b. The fully completed form and all supporting documents (include original, itemized receipts, contracts and invoices) must be submitted to the FSAA by an authorized signer no later than 15 days of the date of the invoice/purchase.
  - c. An original receipt must always be submitted.
    - i. Electronic copies are accepted. Please scan and email the copies to [fsalumni@bill.com](mailto:fsalumni@bill.com) or fax it to 559-570-0100.
  - d. If the reimbursement exceeds \$250.00 signatures from two authorized signers are required.
  - e. Contingent upon all paperwork being complete and correct, the FSAA will process payments and/or reimbursements within a two-week period.

## CASH

The procedures below are to be followed in handling all cash transactions.

1. The responsibility for handling cash is the responsibility of the Treasurer. Any authorized individual who handles cash is responsible for that cash.
2. The designated individual(s) involved in cash operations assumes the responsibility for full and true reporting of all funds received, and that reasonable safeguards are followed.
3. There must be two people operating the Square at all times as a system of checks and balances.
4. Students are not permitted to deliver deposits.
5. Handling of cash
  - a. Square must be used to record/process all cash transactions (as well as credit card and/or checks).
  - b. After the event, a financial report will be generated and provided to the Treasurer (see section above about use of Square for events).
  - c. The Treasurer must then complete a Deposit Form (either short form or long form) to record all payments received. The form is available here: [click here](#).
6. Cash advance
  - a. Cash advances can be made available when needed for small expenses, such as miscellaneous supplies for an event.

- b. All requests for a cash advance must be submitted at least two weeks prior to the date of the event.
  - c. Requests may be made for up to \$300.00.
  - d. To request and receive a cash advance, complete the [Reimbursement and Payment Form](#).
  - e. The payee on the form will be the person responsible for the cash advance. It is important to keep the cash advance in a secure place. The CC will be responsible for any losses that occur.
  - f. The payee will have a maximum of 15 days (from the date of the event) to reconcile the cash advance by submitting original receipts (photocopies of receipts are not allowed), to the FSAA.
  - g. Any remaining difference must be paid back to the FSAA.
    - i. Example
      - 1. CC received \$500.00.
      - 2. Expenses totaled \$480.00.
      - 3. CC must turn in original receipts totaling \$480.00, and the remaining \$20.00 must be paid back to the FSAA.
7. Cash box
- a. The FSAA has cash boxes available for CC's to utilize at events.
  - b. A cash box must be picked up from the FSAA office by the CC Treasurer or other member of the Executive Team.
  - c. The cash box must be signed out and then returned within 48 hours of the event.
8. Petty cash
- a. All requests for a cash advance must be submitted at least two weeks prior to the date of the event.
  - b. Requests may be made for up to \$300.00.
  - c. To request and receive a cash advance, complete the [Reimbursement and Payment Form](#).
  - d. The payee on the form will be the person responsible for the cash advance. It is important to keep the cash advance in a secure place. The CC will be responsible for any losses that occur.
  - e. The payee will have a maximum of two days (from the date of the event) to reconcile the cash advance.
  - f. The cash advance used for the cash box must be indicated on the deposit form, along with any other cash or checks received.

## CHECKS

Checks must include the following:

- 1. All checks must be made payable to the "Fresno State Alumni Association."
- 2. Note the CC name on memo line.

3. Be currently dated—not post-dated, not stale-dated.
4. Be properly signed.

## **DEPOSITING REVENUE**

1. The [Deposit Form](#) must to be used to record any payments received and must be signed by all appropriate individuals.
2. All revenue turned in must reconcile with the deposit form.
3. Deposits must be made with the FSAA according to the following:
  - a. Daily, if the cash receipts accumulated to \$200.00, although more than one deposit a day is not required, plus:
4. Monies from activities, programs and events are automatically deposited into an operating account established for the CC.
  - a. Officers may request to move monies from the operating account to the scholarship account from time-to-time (usually in May or June).

# FUNDRAISING

Chapters and Clubs are encouraged to hold fundraising activities/events in order to raise funds for their chapter/club activities and/or their endowed scholarship. The information below provides guidelines to follow when planning fundraisers.

1. All fundraising activities must be reviewed and approved by the FSAA, and must meet and abide by any and all Fresno State fundraising policies and procedures.
  - a. FSAA staff will provide guidance on fundraising strategy, resources needed, required approvals (both on-and-off-campus), marketing support, identifying other resources and/or campus partners, etc.
  - b. FSAA staff that will be of assistance include: Director of Engagement, Director of Development (fundraising), and the Event Coordinator.
2. All funds raised must be raised using the resources provided by the FSAA. This includes online giving forms, payment processing, event registration (if a fundraiser is executed through/by an event), etc.
  - a. For online giving, third-party providers are not to be used (i.e. crowdfunding platforms, event management services, etc.)
3. The majority of fundraisers are executed through the planning of an event. For additional information about planning an event see the next section.
4. A fundraiser must have an explicit benefit for and connection to both the CC and the University. A benefit can include, but is not limited to:
  - a. Raising awareness about the CC.
  - b. Recruitment to the CC.
  - c. Raising funds for the CC's operating account (to support the CC's engagement activities) and/or for the CC's endowed scholarship.
  - d. Raising funds to support a student group, program, department/unit on campus that the CC wishes to support (i.e. raising money to help a student club build a student booth, or to support a conference or competition a student club wishes to attend, or helping a program buy new materials).
5. CC's should begin planning 4-7 months ahead of time to allow for the full development of the strategy, review and approval, creation of marketing/creative content, and setting up any/all online functionality.

# DONATIONS, SPONSORSHIPS, ADVERTISING, AND FAIR MARKET VALUE

As a way to reduce costs to the CC, all CC's are encouraged to identify individuals, companies, or other organizations who are willing to donate or contribute revenue, products or services. The following information explains the difference between donations (gifts), sponsorships, advertising, and how to determine Fair Market Value (FMV). Additional explanation is provided on how donations and sponsorships are to be accounted for so the entity receives the appropriate credit or recognition, and to ensure the information is recorded according to Fresno State policy.

## DONATIONS, GIFTS, IN-KIND DONATIONS

1. A donation/gift is a contribution received by an institution for either unrestricted or restricted use in the furtherance of the institution for which the institution has made no commitment of resources or services other than possibly, committing to use the gift as the donor specifies (per CASE Standards).
2. Once the University has accepted a donation/gift, it becomes University property. At this point, the donor relinquishes control of the donation/gift and has no direct decision-making power regarding the disposition of the gift. However, donor intent is paramount in determining how the gift is used. If the University cannot comply with the donor's intent, it cannot accept the donation/gift.
3. A gift is considered a donation. Please see the section below for additional information on donations.
4. Due to additional IRS regulations, when a non-cash donation of \$5,000 or more is offered, prior to being accepted, the gift must receive additional review.
5. Gifts with Quid Pro Quo
  - a. A gift is made without consideration. The Latin term "quid pro quo" means "this for that." A quid pro quo donation implies the donor receives something of value in return for the donation. In fact, a portion of the donation represents a purchase of goods or services. The item which is being purchased is referred to as a premium.
  - b. To comply with IRS regulations, the University must provide a written statement to donors of a quid pro quo contribution in excess of \$75. This statement must tell the donor that they can deduct only the amount of the payment that is *more than* the value of the goods or services received by the donor. It must also give the donor a good faith estimate of the value of those goods or services. The University can give the donor the statement either when it solicits the gift or when it receives the gift. This requirement is separate from the written substantiation a donor needs for deductibility purposes (i.e. receipt) which is required for all contributions in excess of \$250 (see *Example 4* below).

- c. By federal law and IRS regulations, the donor *must* reduce the amount of charitable contribution by the fair market value (FMV) of the premium received. The University is required to notify the donor of the FMV of the premium in most cases. This notification should appear on the solicitation vehicle.
6. Receiving/Recording a donation
  - a. Donations made via cash or check may be received using the FSAA Donor Card.
  - b. Donations must be turned into the FSAA within five days of receipt so the donation can be processed and assigned to the Chapter/Club.
  - c. The Donor Card *must* be used so that donor information (name, address, etc.) is captured. This ensures the donor and donation is recorded by Fresno State, and so the FSAA can mail them a donation letter (for tax purposes).
  - d. Donations may also be made online. All information required for record-keeping and tax reporting purposes is captured via the online giving form.

## **OPPORTUNITY DRAWINGS (RAFFLES)**

In accordance with California State legislation, opportunity drawings are permitted with specific restrictions. Please note that 50-50% raffles are illegal in California; only 90-10% raffles are permitted.

1. Any anticipated opportunity drawings must be reported on the CC's [Officer/Board Meetings and Events Schedule Form](#) on an annual basis.
2. Once indicated, the FSAA will submit the required documentation to the State of California Department of Justice.
3. For additional instructions use the [Opportunity Drawing \(Raffle\) – How to Organize](#) resource, and the [Opportunity Drawing \(Raffle\) – Item description sheet](#).
4. After the opportunity drawing has been completed you must submit the completed [Opportunity Drawing Report Form](#) within 15 days of the event.
  - a. This information is submitted along with all other event-related financial information.
5. The FSAA will submit the year-end documentation to the State of California Department of Justice.
6. Opportunity drawing purchases are *not* tax-deductible.

## **SILENT AUCTIONS**

1. CC's may plan silent auctions.
2. For additional instructions refer to the [Silent Auction – How to Organize](#) resource.
3. Every silent auction item must be accompanied by an [FSAA bid sheet](#).
4. All silent auction items are subject to California sales tax.
  - a. Sales tax will be accounted for *after* all auction item proceeds are determined.

- b. If the item is a good/product (i.e. wine), then sales tax must be applied at the current tax rate.
  - c. If the item is a service (i.e. spa day), sales tax *does not* apply.
4. The Chapter/Club is financially responsible for sales tax.
5. After the silent auction has been completed, you must submit all financial information within 15 days of the auction.
  - a. This information is submitted along with all other event-related financial information.

## **SPONSORSHIPS**

1. A payment qualifies as a sponsorship as long as the sponsor does not receive any substantial benefits in return.
2. Per IRS rules, Fresno State and the Fresno State Alumni Association can acknowledge sponsors by mentioning or displaying the following:
  - a. Company name, company logo, product lines and contact information (address, phone number, web address).
  - b. Slogans and value-neutral descriptions of a sponsor's goods or services in acknowledging their support.
  - c. Display or distribute a sponsor's product(s) to the general public at the sponsored activity or event.
  - d. Exception: If the sponsorship is published in a periodical, regularly scheduled and printed on behalf of the University, that is not related to and primarily distributed in connection with a specific event then it is considered advertising. If a newsletter has an online edition, it is considered a periodical. Meeting, convention or event programs are not considered periodicals.
3. Speak with an FSAA staff member for additional guidance.

## **ADVERTISING**

1. Advertising is not a qualified sponsorship payment (i.e. not a gift) if, in return, the organization advertises the sponsors products or services.
2. Advertising includes:
  - a. Messages containing qualitative or comparative language, price information or other indications of savings or value;
  - b. endorsements;
  - c. inducements to purchase, sell or use the sponsor's products, facilities or services.
  - d. Sponsorships and advertisements are *not* a donation. As there is a benefit received by the entity they are *not* tax deductible.

## **FAIR MARKET VALUE (FMV)**

1. According to IRS guidelines, FMV is the price that an item would sell for on the open market. It is the price that would be agreed on between a willing buyer and a willing seller,

with neither being required to act, and both having reasonable knowledge of the relevant facts.

2. How to determine FMV
  - a. According to the IRS, factors in making and supporting the valuation of an item include:
    - i. The cost or selling price of an item
    - ii. Sales of comparable items
    - iii. Replacement cost, or
    - iv. Opinions of experts
3. Why determining FMV matters
  - a. Fresno State (FS), the FSAA, and often times individuals themselves need to determine FMV of an item. Many times a portion of the cost of an activity is considered a donation. But unless the FMV is determined, the individual cannot claim that amount on their tax returns.
  - b. FS and the FSAA must determine FMV for purposes of accurate record-keeping, and to ensure proper tracking of actual donors. Also, so that when a portion of an item is considered a donation, because individuals often wish to claim that on their tax filings, they must have documentation from Fresno State/the FSAA. Thus, FS/FSAA must know the FMV of an item for both internal tracking and auditing purposes, and to ensure proper donor receipting.

## EXAMPLES

<b>Example 1: Annual golf tournament</b>		
Event cost (per person):	\$100.00	
A FMV exercise is completed for each of the elements below:	<b>FMV</b>	<b>Cost to CC</b>
1. One round of golf:	\$50.00	\$40.00
2. Meal:	\$20.00	\$15.00
3. Polo shirt:	\$20.00	\$20.00
4. Total FMV cost:	\$90.00	-----
5. Total CC cost:	-----	\$75.00
6. Total CC profit:	-----	\$25.00
7. Amount considered donation:	\$10.00	-----

**Example 2: Continuing Medical Education Seminar**

Event cost (per person):	\$50.00	
A FMV exercise is completed for each of the elements below:	<b>FMV</b>	<b>Cost to CC</b>
1. Seminar	\$70.00	\$00.00
2. Lunch	\$20.00	\$15.00
3. Total FMV cost:	\$90.00	-----
4. Total CC cost:	-----	\$15.00
5. Total CC profit:	-----	\$35.00
6. Amount considered donation:	\$00.00	-----

**Explanation:**

Often times the speaker may donate their time, or offer it at a reduced cost. However, FMV looks at what the cost would be in the *marketplace*. In this example, because the speaker donated their time, the cost of the event was kept lower, but because the cost for such an event in the *marketplace* would be higher, the per person cost for the seminar, plus the cost of the lunch, resulted in no portion of the fee being considered a donation. The chapter will generate revenue from the event, helping to support their activities and/or their scholarship, but no attendee's to the event will count as donors.

**Example 3a: Silent Auction**

Final bid amount for an item (iPad). Item was donated by local company:	\$500.00	
	<b>FMV</b>	<b>Cost to CC</b>
1. CC sets minimum bid amount for iPad	\$400.00	\$00.00
2. Total CC cost:	-----	\$0.00
3. Total CC profit:	-----	\$500.00
4. Amount considered donation by the <i>donor of the item</i> :	See below	
5. Amount considered donation by the <i>individual who won bid</i> :	\$100.00	-----

**Explanation:**

1. Donor of the iPad: It is up to the donor of the item to determine the FMV. The donation letter to the donor from the FSAA or the CC for a non-cash donation can only list a description of the item donated. It can never include the FMV. It is up to the donor to determine the FMV when they are preparing their tax return.
2. Winner of the iPad: Because the final amount they paid was more than the minimum bid amount, the \$100 difference is considered a donation.

For additional directions on Silent Auctions refer to the handout [Silent Auctions – How to Organize](#)

**Example 3b: Silent Auction**

Final bid amount for an item (iPad). Item was donated by local company:	\$200.00	
	<b>FMV</b>	<b>Cost to CC</b>
1. CC sets minimum bid amount for iPad	\$400.00	\$00.00
2. Total FMV cost:	\$400.00	-----
3. Total CC cost:	-----	\$0.00
4. Total CC profit:	-----	\$200.00
5. Amount considered donation by the <i>individual who won bid</i> :	\$0.00	-----
6. Amount considered donation by the <i>donor of the item</i> :	See below	

## Explanation:

1. Donor of the iPad: It is up to the donor of the item to determine the FMV. The donation letter to the donor from the FSAA or the CC for a non-cash donation can only list a description of the item donated. It can never include the FMV. It is up to the donor to determine the FMV when they are preparing their tax return.
2. Winner of the iPad: Because the final bid amount was less than the minimum bid, while the CC still generates \$200 in revenue, the winner of the iPad does not receive any donation credit.

For additional directions on Silent Auctions refer to the handout [Silent Auctions – How to Organize](#)

**Example 4: Quid Pro Quo**

1. Individual makes donation of wine for an event, value of donation:	\$500.00
2. In exchange, the individual receives sponsor recognition, valued at:	\$200.00
3. Amount the donor may deduct as a donation:	\$300.00
4.	
5.	
6.	

## Explanation:

3. Donor of the iPad: It is up to the donor of the item to determine the FMV. The donation letter to the donor from the FSAA or the CC for a non-cash donation can only list a description of the item donated. It can never include the FMV. It is up to the donor to determine the FMV when they are preparing their tax return.
4. Winner of the iPad: Because the final bid amount was less than the minimum bid, while the CC still generates \$200 in revenue, the winner of the iPad does not receive any donation credit.

For additional directions on Silent Auctions refer to the handout [Silent Auctions – How to Organize](#)

# EVENT PLANNING

The FSAA provides event planning resources to officially recognized CC's. Below are guidelines and helpful tips on planning a successful event.

## HOW THE FSAA SUPPORTS YOUR EVENT

1. Planning resources are available [here](#).
2. Graphic design support.
  - a. University branding standards
    - i. All event collateral (digital or print) must adhere to Fresno State Branding Standards and be approved by the FSAA before use.
    - ii. This includes, but is not limited to: Invitations, brochures/flyers, clothing, banners, etc.
3. Online event registration and payment processing.
4. Email and social media event marketing.
5. Post-event financial reconciliation.

## CHAPTER/CLUB RESPONSIBILITIES IN EVENT PLANNING

1. Consult with the FSAA events staff liaison throughout your event planning process.
2. Always complete the [Event Planning and Promotions](#) form.
  - a. This is required documentation for FSAA liability insurance reporting.
  - b. Submit 60-90 days prior to the date of your event.
  - c. This form facilitates graphic design, marketing, and online event registration support as needed.
3. Planning your event, including securing a location, obtaining proper waivers, securing contracts, contact with event vendors and other event logistics. For additional help, see the online resource, [Planning a Fun, Purposeful Event](#).
4. Event financials.
  - a. Please refer to the “Financial Practices” section for additional information.
5. Execution of event.
6. Post-event wrap-up.
  - a. Submit the [Post-Event Report Form](#) within 15 days of the event.
  - b. For financial reconciliation information, please refer to the “Financial Practices” section of this guide.

## **EVENTS HELD ON-CAMPUS**

1. Any event held on Fresno State's campus must adhere to University Policies including but not limited to:
  - a. Reservations of campus facilities, including the Smittcamp Alumni House.
  - b. University alcohol policy.
  - c. Use of University Catering (unless a food waiver is submitted and approved by the University).
  - d. Use of Pepsi and Budweiser products at all events.
2. Consult with FSAA staff for additional guidance and direction.

# SCHOLARSHIPS

## ESTABLISHING A SCHOLARSHIP

1. A scholarship fund may be established with a \$100 donation.
2. An endowment and associated scholarship agreement is executed when the balance in the fund has reached \$5,000.
3. At the time the endowment is established, a plan must be established to increase the amount of the endowment to \$25,000 within a five year period.
4. Consistent with Fresno State policy, the FSAA *requires* that a CC raise the initial \$5,000 for its scholarship endowment fund, first, before awarding any one-time scholarships out of its operating account.
5. Working with the FSAA and Fresno State's Scholarship Office, the CC will identify any additional eligibility requirements.
  - a. All criteria must be reviewed and approved by the Fresno State Scholarship Office, the FSAA's Scholarship Committee, and the FSAA Board of Directors.
6. After a scholarship has been officially endowed with the initial \$5,000.00, it can take up to two years for it to realize initial earnings.
  - a. When necessary, CC's are encouraged to establish their own selection committee to review applications and select a scholarship recipient.

*Please see "How Scholarships Work: A Visual Example" at end of this section.*

## MANAGING YOUR SCHOLARSHIP

1. The FSAA scholarship endowment is overseen by the FSAA Executive, Finance, and Scholarship Committees.
2. The FSAA works with an off-campus investment firm to review and revise prudent investment policies.
3. The FSAA scholarship endowment is the "pie," while the chapter, club or individual scholarship is a "slice of the pie."
4. Endowment reports to CC's and individuals are provided one time per year, in the spring semester.
5. Any individual may join the FSAA Scholarship Committee. You do not have to be a member of the FSAA Board of Directors in order to participate.

*Please see "How Scholarships Work: A Visual Example" at end of this section.*

## SCHOLARSHIP EARNINGS CYCLE

1. On June 30<sup>th</sup> of every year the FSAA will “draw a line in the sand” to review scholarship endowment levels to establish allocations for the *following* year’s awards.
2. Process
  - a. The FSAA Finance Committee, with the assistance of the FSAA’s off-campus investment firm, will make an overall allocation recommendation to the FSAA Scholarship Committee.
  - b. The FSAA Scholarship Committee will review the overall allocation and establish individual amounts (for each scholarship award), and then make a recommendation to the FSAA Board of Directors.
  - c. At that time, the Board of Directors will either approve or deny the recommendation.
3. Example:
  - a. June 30: The “Acme Endowed Scholarship” has an endowment level of \$50,000.
  - b. The allocation is 5% (\$2,500.00).
  - c. The “Acme Endowed Scholarship” will provide a \$2,500 for the year *after* next year’s academic year (academic year 2016-2017).
    - i. Please note: The designation is *not* applied to the *immediate* upcoming fiscal year (academic year 2015-2016).

Please see “How Scholarships Work: A Visual Example” at end of this section.

## GROWING YOUR ENDOWED SCHOLARSHIP

1. Balancing long-term growth with yearly scholarship awards
  - a. After the scholarship is endowed at \$25,000.00, the CC may utilize up to fifty percent (50%) of its fundraising dollars to increase its scholarship endowment fund; and also utilize the remaining amount, up to fifty percent (50%) of its fundraising dollars, to provide as an annual, one-time scholarship.
  - b. Whatever dollar amount the CC wishes to award as a one-time scholarship from its operating (general) account, the *same amount* must be moved to its endowed scholarship (endowment) account on an annual basis.
    - i. Example:
      1. A CC has \$50,000 in its endowed scholarship.
      2. They have \$10,000 in their operating account.
      3. They award a \$2,000 scholarship from their operating fund.
      4. They must *also* transfer \$2,000 into their endowment, increasing the endowment to \$52,000.
2. Most CC’s will hold various fundraising events throughout the year. The proceeds of these events will often benefit the CC’s endowed scholarship.

- a. Examples of events: Golf tournaments, silent auctions, seminars/workshops/continuing education workshops.
3. The following forms of payments/donations are accepted: Cash, checks and credit card gifts, donations in the form of securities, real property and corporate matching gifts, gifts derived from beneficiary designations on life insurance policies, retirement plan accounts, living wills and trusts.
4. For additional ideas on generating revenue to help build an endowed scholarship contact the FSAA staff.

*Please see "How Scholarships Work: A Visual Example" at end of this section.*

## **SCHOLARSHIP TIMELINE**

1. All potential scholarship recipients (students) must complete an official Fresno State online scholarship application. The window to apply is from October 1<sup>st</sup> (fall semester), through February 28 (spring semester). All FSAA scholarships are applied for via this online scholarship application.
2. With the assistance of Fresno State's Scholarship Office, in the spring the FSAA will run applications for the CC's Scholarship Committee's to review and select scholars, as well as alternates.
3. Once recipients are selected, prior to notifying the recipient the FSAA is required to:
  - a. Verify their enrollment for the upcoming semester.
  - b. Confirm they have completed any/all registration requirements.
  - c. In addition to the actual recipient, it is required to select two alternates per scholarship.
4. Once enrollment and other registration requirements are confirmed, the FSAA will notify the student they have been selected as a recipient electronically.
5. The student must then accept the scholarship through Fresno State's online portal.
6. After the student accepts, the FSAA will send the student confirmation via mail.
7. If the recipient declines the scholarship, or does not meet the criteria (i.e. they will not be enrolled), the alternate will be contacted and offered the scholarship.

*Please see "How Scholarships Work: A Visual Example" at end of this section.*

## **FSAA MATCHING SCHOLARSHIP PROGRAM**

The FSAA provides CC's with up to a \$500 matching scholarship to support student scholarships.

How the Matching Scholarship Program works:

1. A CC must comply with all CC annual renewal and maintenance requirements (i.e. they must be a currently recognized CC with officers).

2. To apply, complete the ["Matching Scholarship Program"](#) form and submit by no later than April 1<sup>st</sup>.
3. As funds are available, the FSAA will match *up to* a maximum of \$500.00.
4. Matching funds are provided on a "first come, first serve" basis.
5. The "match" will be based on the total amount of the scholarship.
  - a. Example 1: A \$250.00 scholarship will *only* receive a matching fund *up to* a \$250.00, for a total scholarship award of \$500.00
  - b. Example 2: A \$500.00 scholarship *can* receive a matching fund *up to* a maximum of \$500.00, for a total scholarship award of \$1,000.00.
  - c. Example 3: A \$2,000.00 scholarship *can* receive a matching fund *up to* a maximum of \$500.00, for a total scholarship award of \$2,500.00.
6. The match is based on the earnings (interest) of the endowed scholarship, not from funds in the operating account.

*Please see "How Scholarships Work: A Visual Example" at end of this section.*

## HOW SCHOLARSHIPS WORK: A VISUAL EXAMPLE

### Timeline

	<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>	<u>Jul</u>	<u>Aug</u>	<u>Sept</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>
<b>Year 1</b>						1				2		
<b>Year 2</b>		3	4	5			6	7				

### Timeline Explained

1	June 30 (Year 1) earnings of a \$50,000 scholarship yield a 7% return. The determination is made to use 5% (\$2,500) to award a scholarship. The remaining 2% is reinvested into the endowment. Scholarship is awarded the <i>following</i> September (Year 2; #7).
2	Scholarship application period for the <i>next</i> academic/fiscal year begins.
3	Scholarship application period closes.
4	Review of scholarship applications, recipients (primary and alternate) are selected by the CC's selection committee.
5	A CC may submit paperwork to the Matching Scholarship Program to have <i>up to</i> an additional \$500 added to their scholarship.
6	Scholarship recipients are vetted to ensure they meet eligibility criteria (i.e. are enrolled for the upcoming year). If all criteria are met, recipients are notified they have been selected, are sent information to accept and must return information to the FSAA.
7	Recipients receive their scholarship.

# ORDERING PRODUCTS AND SUPPLIES

Many CC's will order products for their organization, or require supplies are part of their events or normal operations. Products can include polo shirts, t-shirts, branded tablecloths (with the CC's name/logo on it), or other giveaways. Below are general guidelines for all products and supplies.

## ORDERING PRODUCTS

1. All products must be ordered through the FSAA, using vendors that are licensed with Fresno State. The FSAA will connect the CC with the appropriate vendor, helping to facilitate communication and the design/review process.
2. Licensed vendors are companies that have met specific criteria in using Fresno State and affiliated trademarked names and that often provide reduced rates. As all logos have "Fresno State" as part of the logo, and as "Fresno State" is a trademarked name, any/all items that have the CC's logo on it are required to be ordered through a licensed vendor.
3. For items where a trademark does not apply/is not used, it is still required to use a licensed vendor.
4. The use of the Fresno State seal is not permitted without special approval from the University Communications office.

## ORDERING SUPPLIES

CC's have the option of ordering supplies through the FSAA, but may also purchase supplies on their own (to be reimbursed for supplies purchased on their own, the CC must submit the Payment/Reimbursement form along with the original receipt). Supplies that can be purchased through the FSAA, and their cost, include:

Item	Cost
Bulldog paw pins*	First 30 are free \$1.00 per pin after 30
Name tags (8 per sheet)	\$0.50 per sheet
Black/White copes	\$0.05 per sheet
Color copies	\$.10 per sheet
Mailing envelopes	\$0.03 each
Reply envelopes	\$0.02 each
Labels (30 per sheet)	\$0.50 each
Postage	Current rate

*\*Paw Pins can only be ordered through the FSAA*

When items are ordered through the FSAA, the cost will be billed directly to the CC. If there are items needed that do not appear on this list please inquire with the FSAA.

# LEGAL

## CONTRACTS AND AGREEMENTS

1. As CC's are under the non-profit status of the FSAA, any matters involving contracts more than \$500.00 must be approved by the FSAA and Fresno State.
2. Questions concerning these matters should be directed to the appropriate FSAA staff.

## INSURANCE COVERAGE

This section serves as a reference intended to provide CC's with information and guidelines concerning liability and volunteers. Please be aware that the FSAA's insurance carrier will determine claims and incidents on a case-by-case basis.

1. Liability Insurance
  - a. As officially recognized organizations under the FSAA, CC's are generally covered under the FSAA's insurance. However, when having an event, some off-campus venues may require the CC to provide a certificate of insurance and liability coverage. If/When this occurs, the CC must contact the FSAA's Event Coordinator to obtain the proper documentation. See "Liability Insurance Coverage" below for additional information.
  - b. Transportation
    - i. Cars and Truck Rentals
      1. If a rental car and/or truck are needed, the volunteer must use their personal automobile insurance if an incident occurs. In the event of an incident, the volunteer's automobile insurance will be the primary source of insurance; the FSAA liability coverage will be the secondary. The FSAA liability insurance will only apply during the time specifically used for CC business.
      2. Example: U-Haul truck rented for event. Later used for personal use. Incident occurs during personal use will not be covered under the FSAA liability insurance.
    - ii. Volunteer Drivers
      1. All volunteer drivers must have both a valid driver's license and personal automobile insurance coverage. This policy applies when driving personal or rented vehicles.
      2. If a volunteer driver does not have a license or insurance, they are *not* covered by the FSAA liability insurance.
    - iii. Events

1. Any incidents that occur during an event that has *not* previously been reported to the FSAA as being organized by the CC will not be covered under the FSAA liability insurance.
- iv. Vendor Liability
  1. CC's must obtain proof of liability insurance from all vendors used for an event, *before* the event takes place. This includes, but is not limited to, venues and entertainment.
  2. Proof of liability insurance is evidenced by obtaining a valid certificate of insurance with the "Fresno State Alumni Association" listed as an additional insured party, with the appropriate additional insured endorsement.
- v. Bounce houses and live animals
  1. Any vendor renting "fair-like" equipment must carry liability insurance. "Fair-like" equipment includes, but is not limited to, bounce houses, petting zoos and mechanical rides.

## **CLAIM REPORTING**

1. Any incident that occurs during a CC event must be reported to the FSAA immediately. Be prepared with the following information:
  - a. Event name, date, location, and time of incident
  - b. Name and contact information of individuals involved
  - c. Description of incident
  - d. Did the Security respond? Was Security contacted? If so, case number?
  - e. Did the Police respond? Were Police contacted? If so, case number?
  - f. How did the CC handle the incident?
  - g. Name and contact information of any witnesses
  - h. Name and contact information for volunteer submitting incident report.

## **WORKERS' COMPENSATION**

1. Volunteers are not covered under Workers' Compensation.

## **ALCOHOL**

1. Alcohol should be served by a venue or caterer that has the appropriate license to serve alcoholic beverages. A venue or caterer serving alcohol must have liability insurance.
2. The CC is responsible for obtaining proof of liability insurance from the venue or caterer.
3. Any event held on campus where alcohol is to be served is required to follow Fresno State's guidelines regarding alcohol safety.
4. Pre-approval from Fresno State is required before serving alcohol on campus.

## **VOLUNTEERS**

1. All FSAA-related volunteers must be 18 years of age.

## **AMENDMENTS TO THE POLICY AND RESOURCE GUIDE**

1. All substantive amendments to this guide require a two-thirds (2/3) affirmative vote of a quorum of the FSAA Board of Directors.
2. This guide shall be reviewed and updated annually as deemed necessary by the FSAA Board of Directors, with input provided by the FSAA staff.
3. Any non-substantive amendments, limited to correcting formatting issues or typographical errors, can be made at any time, as directed by the Executive Director of the FSAA.
4. Non-substantive amendments do not require the approval of the Board of Directors.

# **SUSPENSION, DISSOLUTION, AND RECLASSIFICATION**

The FSAA is committed to assisting all recognized CC's to being viable and successful. When a CC is unable to meet the minimum CC Maintenance Requirements, it may face suspension, dissolution or reclassification.

## **SUSPENSION AND DISSOLUTION BY THE CHAPTER OR CLUB**

1. A CC may be suspended if there is no longer an interest or ability by the CC leadership or constituents to maintain the CC.
2. The FSAA will acknowledge the CC suspension when it receives written notification from the CC leadership of self-imposed suspension.
3. The written notification should be directed to the FSAA.
4. The FSAA staff will inform the FSAA Board of Directors of the self-imposed suspension.
5. Upon recognized suspension by the FSAA Board of Directors, all funds generated by the suspended CC's activities and events will be held in trust by the FSAA for one year. These funds cannot be expended, except for the reactivation and maintenance of the CC.
6. If after one year from the date of suspension, the CC is not reactivated, then the CC may be dissolved by the FSAA Board of Directors.
7. Upon dissolution, and funds held in trust will be transferred to the FSAA general operating account.

## **SUSPENSION AND DISSOLUTION BY THE FSAA**

1. The FSAA may suspend a CC if it fails to meet the CC maintenance requirements.
2. When suspension or dissolution becomes necessary, the following process will be followed:
  - a. A written notice of suspension will be sent to the CC's leadership team by the FSAA.
  - b. The notice shall include a request to participate in a meeting with the members of the leadership team to discuss the CC's status.
    - i. An additional notice will be sent to the Dean/Department Chair/Representative, requesting their participation at the meeting.
  - c. Depending on the outcome, FSAA staff will make a recommendation regarding the CC's ongoing status – continuance, suspension or dissolution – to the FSAA Board of Directors.

- d. Should suspension be the outcome of the meeting(s), then all funds generated by the CC's activity will be held in trust by the FSAA for one year. These funds cannot be expended, except for the reactivation and maintenance of the CC.
- e. If after one year from the date of suspension, the CC is not reactivated, then the CC may be dissolved by the FSAA Board of Directors.
- f. Upon dissolution, the CC funds held in trust will be transferred to the FSAA general operating account.