**Marlan and Rosemary Bourns College of Engineering**

# STUDENT ORGANIZATION POLICY HANDBOOK 2018

This handbook is intended for the purpose of policies and procedures to better assist student organizations in engineering.

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# Contacts

Here are the list of contacts for professional development. Contacts should be made based on relativity such as; approvals, donations, sponsorships etc.

**Professional Development Support**
Lupe Ruiz-
gruiz@engr.ucr.edu
Transfer Initiatives & Professional Development Coordinator
Student Services Building 1227
- First contact in regards to events, approvals, room reservations, parking requests, event planning, conference and projects reimbursements.

Richard Bain-
rbain@engr.ucr.edu
Administrative Assistant III
Winston Chung Hall 446
- Processing approved orders, purchase orders and reimbursements. Providing access keys for engineering conference rooms.

**Development Support**
Elliot L. Emmer-
Elliot.emmer@ucr.edu
Development Coordinator
Winston Chung Hall 446
- Providing corporate relations guidance.

DuBron M. Rabb-
Dubron.rabb@ucr.edu
Associate Director of Development
Winston Chung Hall 446
- Providing corporate relations guidance, assistance with alumni, sponsorships and donations.

Jed Schwendiman-
Jed.schwendiman@ucr.edu
Director of Development
Winston Chung Hall 446
- Oversight of strategic corporate relations, sponsorships and donations.

**Safety & Facilities**
Maggie Souder-
msouder@engr.ucr.edu

Safety & Facilities Coordinator
Winston Chung Hall 446

- Assistance with facilities, room usage and engineering spaces.

Robert Lopez-
lopezra@engr.ucr.edu
Safety & Facilities Assistant
Winston Chung Hall 446

- Support with facilities, room usage and engineering spaces.

# Funding Guidelines

The Dean's Office provides limited funding for professional organizations and clubs within the Bourns College of Engineering.  A professional club, organization or society is defined as an organized group functioning under approved bylaws with a faculty advisor within the College, its officers are all BCOE majors. BCOE organization leaders must maintain good academic standing with a minimum 2.0 cumulative GPA.

**Funding Proposals:**

Funding proposals are due the fourth week in October.  The College's Chief Financial Officer reviews all proposals and submits them to the Dean for final approval.  Awards are announced the first week in November.  Awards range in amount and are subject to approval guidelines.

Requests may be submitted for the following activities and/or events:
- Guest speakers and development of connections with industry representatives and alumni.
- Projects.
- Participation in regional and/or national competitions and conferences.
- Leadership and professional development training.
- Outreach activities for K-12.

Funding is not permitted
- For t-shirt purchases, with the exception that they will be used for an event.
- General operating expenses.
- Refreshments for regular (weekly/bi-weekly) club meetings.
- Gifts and awards (unless special approval has been granted). **Gifts should be purchased from the UCR Bookstore whenever possible.  ASUCR and other outside funding sources (gifts) will be used first to pay for gifts.**
- Conference attendance for students with GPA's below 2.0, or non-engineering majors.

Proposals should include the following:

1. Complete budget for current academic year, <u>signed by the club advisor</u>.  This budget needs to detail specific expenses, consistent with the above criteria.  Amounts awarded are based on the amount of matching funds shown in the budget.
2. Last year's budget detailing how money obtained from the college was spent.
3. Two-page summary of goals accomplished in the past year and plans for this year.
4. Listing of officers and advisor, along with contact information and the organization web address.
5. Plans to obtain additional funding.
6. List of company and alumni contacts, mentors, etc., made during the past year.
7. The club calendar for the current academic year.

Awards are for the current academic year only and cannot be rolled over. Dean's funding is not intended to sustain the organization, but rather to assist in promoting professional development.

A final report with details on how the awards were spent is due before the end of the academic year. Proposals should be submitted to Professional Development Coordinator – Ms. Lupe Ruiz and the Leadership Council.

**Dean's Approved Budgets (DAB):**
- Dean's budget is based on total funding available for student organizations for the academic year for which proposals are being written. Budgets are evaluated based on previous year's spending, responsibility, effectiveness and need.
- Funding is not guaranteed.
- Funding is disbursed on a year-to-year bases.
- Each organization is responsible for budgeting adequately.
- Should an organization incur fees such as, but not limited to; fleet vehicle damage, conference room damage, property damage, or event fee's, the fee will be withdrawn from the organizations budget. In the event the organization has exhausted their funds, the fee will be withdrawn from the following year's budget.

# <u>Policies and Procedures</u>

**Purchasing Procedure**

Purchases Orders (PO's) are used as form of payment for approved campus vendors. All student organizations are required to submit an expenditure pre-approval form **prior to any and all** purchases being made through the college, to the Professional Development Coordinator.

If the vendor is not approved, we can send a request to Accounting and it is usually processed within 1 or 2 days.

Purchase Orders & Reimbursements:
- Requests for Purchase Orders (PO's) must be submitted 2 weeks prior to the date needed by.
- Requests must only be made with the current balance of your budget. No projected funds.
- Requests must identify the account for which the PO will be made from.

Reimbursements will **only** be allowed in the event of an emergency and communication to the Professional Development Coordinator must be made immediately. **NOTE:** purchases must be made within the constraint of the organization's budget.

Ebuy is currently being prepared for student use and is expected mid-Spring quarter.

- Reimbursement procedure:

  1. An approval must be requested **PRIOR** to purchase from the Professional Development Coordinator.
  2. Once the purchase has been approved, only the times within the budget approved must be purchased.
  3. After purchase/or event (in the case of conferences), receipts must be submitted within **5 business** days for reimbursement processing to the Professional Development Coordinator. Along with the receipts, a filled out W9 must accompany the receipts.
  4. Please allow 2-3 weeks for processing.

Department Credit Card:
If the vendor does not accept purchase orders, we also have a department credit card that we can use. ONLY the Dean's Office is allowed to make purchases and **cannot** be used for food, travel, or gift cards, but can be used for almost any other type of supply.
- Approval PRIOR to purchase must be made with the Professional Development Coordinator.

# <u>Organization Event Planning</u>

<u>Room Requests:</u>
- For general meetings, all room requests must be submitted by the Friday of week 10 of the PRIOR to the quarter you are submitting. For example: if you are requesting general meetings for Winter quarter, requests will need to be in by Friday, week 10 of Fall quarter.
  - Except for Fall quarter, all requests will need to be in by Monday 5pm of week 0.
- Committee, workshop and project meeting requests must be in 2 weeks in advance.
- All room requests will be made through [Room Requests](#) in the following format:
  - Name of organization:
  - Name of event:
  - Room preferred: (not guaranteed)
  - Date:
  - Time:
  - Quantity of expected guests:
- All rooms must be left in the original condition. If food and drinks are present at your event, trash must be taken out to the dumpster. Failure to complete will result in a citation against your organization.
- Large events requiring multiple rooms must be submitted one quarter in advance.
- Edits may only be made in the event of an emergency.
- Failure to properly submit requests may result in delay or in unfulfilled request.


<u>Emails:</u>
- Forwarded email requests must be submitted by Friday 5pm, the week prior to when your event will be held. Email requests the week of, will not be sent out.
- Follow-up emails on meetings will not be sent. It is up to the organization to collect information for future announcements.
- Emails must be formatted properly and ready to send with the appropriate size.

<u>Flyers:</u>
- Printed flyers may be requested with a maximum of 20 per event. Exceptions to be made for waivers, and activities. Should you have an exception for your event, see Professional Development Coordinator in advance.

<u>Events:</u>
- Parking, physical plant (cleaning, maintenance), and media need to be planned with the Professional Development coordinator and Dean's staff 30 days prior to event.
- Weekend and Overnight events require faculty, staff or security for the duration of the event. Please plan accordingly when submitting event requests.
  - For large events, a meeting must be scheduled with the Professional Development Coordinator (Lupe Ruiz) and the relative Dean's staff (Richard and Maggie) 2 months **minimum** before your event is scheduled to take place.


<u>Conferences:</u>

- For reimbursement purposes, travel expenses must be approved by the Professional Development Coordinator two weeks prior to conference. Please see reimbursement procedure.
- Fleet services may be arranged **two weeks prior** to event, however, vehicle must be driven by a UCR student employee. Please contact Lupe or Richard for current rental pricing.

Office Hours:

Monday: 1:30PM-4:30PM
Tuesday: 1:30PM-4:30PM
Wednesday: 9:00AM-11:30AM
Thursday: 9:00AM-11:30AM
Friday: No Appointments

**NOTE:** Hours may vary based on meeting, workshops and events. Please check emails updates.

# Leadership Council

The BCOE Leadership Council (LC) is an organization composed of elected representative from the BCOE organizations. Our goal is to continue the excellence that BCOE organizations are known for and to increase collaboration among the organizations. LC is composed of five positions: President, Vice-President, Secretary, Treasurer, Webmaster, all of which have previously served as board members within their BCOE student organizations. You may contact LC for questions/comments at bcoeucr@gmail.com.

Qualified candidates for LC Officers must have had previously served as a board member on any of BCOE's student organizations.

Organization Elections:
Each organization must hold elections during the Winter Quarter to ensure ample time for transitions to take place.

Leadership Counsel (LC) expectations and guidelines for student organizations:

Mandatory Officer Trainings:
Fall Training:
- A series of presentations and workshops hosted by the current LC board and BCOE Professional Development Coordinator. Training covers skills, policies, procedures and protocols for BCOE student organizations.
- **All officers are required to attend**. In the event of an emergency ONLY, officers must notify both BCOE LC and Professional Development Coordinator and arrange a meeting to discuss training information.

Spring Training:
- A welcome to incoming officers and some basic information about BCOE LC policies, procedures and protocols are introduced. In addition, LC Elections are held during this training.
- **Current and incoming officers are required to attend this training.** In the event of an emergency ONLY, officers must notify both BCOE LC and Professional Development Coordinator and arrange a meeting to discuss training information.

As a BCOE organization, you are expected to perform the following items:

- Be responsive to all organization communication networks.
- Have representatives at LC's events.
- Turn in an end of the year report.
- Be respectful of the LC clubroom's communal items.
- Be respectful of other organization's spaces in the clubroom.
- Leave the clubroom cleaner than when you arrived.
- Failure to follow the expectations will result in citations.

Info on citations:

- Your org will receive a citation if you or your officers repeatedly fail to comply with certain rules or if you do not attend certain mandatory events.

Before a citation is given:

- We will agree as a group what activities will mandate a citation.
- You will be given one warning or reminder.
- A citation will be issued.
- After three citations, your org will revoke their place in the LC room. All belongings in the desk must be removed.
- Citations reset at the beginning of the academic year.

Event Collaboration:

- In order to minimize overlap of events
- Gather topic experts together so the audience has the most fulfilling experience possible
- For a better turnout

End of the Year Reports:

- This determines your eligibility for BCOE Awards as well as continued support from BCOE
- These are required to be turned in at the end of the year, before banquet.
- Here is the End of the Year Report Template
- Last year EWB's report won Best EOY.
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Avenues of Communication:

- Update your Google Calendars
- BCOE Website: Has members of the month
- BCOE Facebook group: For advertising to all of BCOE, please add all your BCOE friends!
- LC Slack: all officers must join!