



McGeorge School of Law

RSO Manual

McGeorge CASE - Campus Activities & Student Engagement

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Facebook/Instagram @McGeorgeCASE

*CASE is part of the McGeorge Office of Student Affairs at
University of the Pacific, McGeorge School of Law*

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Introduction

Dear Student Leader:

Welcome to your leadership position! McGeorge School of Law takes great pride in the variety and involvement of its Student Bar Association (SBA), SBA Student Committees, and Registered Student Organizations (RSOs). These groups have a special relationship with the Law School and enjoy privileges that individual students and off-campus groups do not have.

McGeorge Campus Activities & Student Engagement (CASE) - part of the Office of Student Affairs - is the department through which student groups register at McGeorge. The CASE Office, located in Administration Building Office 106, is staffed by knowledgeable student-employees who hold regular drop in office hours throughout the academic year.

When you need assistance with filling out paperwork, reserving a room, or ANYTHING else, stop by for assistance. The drop in schedule is posted on our office door, or you can always email McGeorgeCASE@pacific.edu. In addition to the CASE student-employees, the entire Office of Student Affairs team is excited to work with your group. You can reach us at sacstudentaffairs@pacific.edu, or individually at our contact info listed below.

Please read and keep this Manual for future reference. While this Manual discusses many topics frequently encountered by student groups, it is not exhaustive and things are subject to change. If you come across a topic where you would like more information, please ask.

We look forward to working with your group!

Warmly,

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Part 1: Registration

Students have the freedom to organize and join organizations to promote their common interests. McGeorge students have registered groups covering a wide variety of topics. These experiences round out your classroom learning through personal growth, development of leadership skills and professional contracts, the opportunity to practice classroom theory in true-life practical experiences, deeper connection with your peers and the school, and more.

RSO status comes with benefits and responsibilities. RSOs are afforded access to campus resources and, in turn, agree to comply with policies and procedures established for the governance of RSOs. Recognition creates an official relationship with the school, but in no way implies that McGeorge approves of, sanctions, or takes responsibility for a RSO's actions or activities. Individuals involving themselves with a RSO do so at their own risk.

Registration Requirements

1. **Annual Registration: RSOs must register with McGeorge CASE annually.** There are five steps - (1) submit a *Registration Form*, (2) submit an *Advisor Agreement Form*, (3) complete the required training, (4) upload your group's constitution on canvas, and (5) submit a *Signature Form*.
2. **Registration Deadline: The registration deadline is October 1.** Groups that do not meet this deadline will be considered inactive and will no longer be recognized by the University. Any remaining funds in the group's agency account will be reallocated the semester following their inactivity. Groups are encouraged to register early (before summer) so they can participate in the Orientation Club Fair.
3. **Membership: Pacific is strongly committed to a policy against discriminatory practices based on protected category.** All RSOs and programs at Pacific are governed by this policy of non-discrimination. RSO membership is available to McGeorge students, subject to individual constitutional restrictions; any such restriction must be consistent with federal, state, and local laws and University of the Pacific policies.
4. **Constitution: Organizations must provide a current copy of their constitution during the annual registration process.** (See: "Constitution and Bylaws" section.)
5. **Officers: RSOs must have at least three student-officers:** At minimum, RSOs must have a president, treasurer, and third officer. Officers must be in good academic standing (a cumulative GPA of 2.33 or higher). Officers are expected to be active within the group, responsive to inquiries, available for regular meetings, and responsible for the RSO's activities. Officers may be held personally liable, collectively or individually, for any debts or obligations incurred, including debts owed to the University.
6. **Advisor: RSOs must have an advisor who is part of McGeorge's full-time faculty or staff.** (See: "Advisor" section.)
7. **Affiliation: RSOs that wish to be affiliated with a local, state, or national group must provide a current copy of that group's governing documents during the Registration process.** RSOs may not affiliate with any organization that requires its affiliates to support specific economic, political, or social positions that conflict with University policies. Regardless of affiliation, RSOs shall maintain autonomy on this campus.

Part 1: Registration (cont'd)

Registration Checklist

- 1.) Find a minimum of three officers and submit your *RSO Registration Form*
- 2.) Find an advisor and submit your *RSO Advisor Agreement Form*
- 3.) Complete the online training modules on Canvas
- 4.) Upload your group's constitution on Canvas
- 5.) Submit your *RSO Signature Form*

Does your group want to participate in the Orientation Club Fair and be featured in advertising distributed to 1L students?
Then submit your Registration Form (#1) and Advisor Agreement Form (#2) by Tuesday, April 25, 2017! (the last day of classes) You can complete steps 3-5 at a later time, before the Oct. 1 deadline.



Eligibility Criteria

The following criteria are used to guide the review of applications for recognition:

1. Appropriateness of the organization to a professional school,
2. Relationship to the school based upon its purposes and functions,
3. Capability for continued growth and stability of membership,
4. Unique or complementary contribution when compared to existing campus groups,
5. The student organization must be non-commercial in purpose, and
6. Ability to be financially independent.

Benefits

Subject to other University policies, and local, state, and federal laws, benefits of RSO status include:

1. Scheduling the use of University facilities.
2. Hold meetings and plan events, including the use of tables in the Student Center.
3. Hold fundraisers and offer tax deductible status for donors.
4. Have a University agency account.
5. Request funding from SBA.
6. Marketing and advertising your group on campus, including within The Docket.
7. Use of the name of the McGeorge name and logo in correspondence and publicity.
8. Access to a campus mailing address and mailbox.

Part 1: Registration (cont'd)

Responsibilities

Subject to other University policies, and local, state, and federal laws, responsibilities associated with RSO status include:

1. Manage the RSO within the provisions of its constitution (and bylaws, if applicable).
2. Have officers who act ethically and professionally at all times, observe campus policies and procedures and educate members of their group about relevant policies and procedures, cooperate with and send representatives to all meetings and mandatory trainings called by University administration, and conduct all organization activities in accordance with the University's educational mission.
3. Regularly communicate with its selected advisor.
4. Request all on- and off-campus events, meetings, fundraisers, tabling, volunteer work, and other RSO activities in accordance with the event request process.
5. Conduct all fiscal operations in accordance with proper standards of business management; have officers who keep orderly records, act within the realm of their authority, and collect and dispense organization monies with a high degree of trust and openness; carefully budget funds to carry out the interests and activities of the organization; and promptly reimburse Pacific for all expenses incurred on behalf of the organization. In the event that a RSO account is not paid in full, all rights and privileges will be temporarily suspended until its accounts are cleared.
6. Create a leadership succession plan to ensure successful officer transition and transition of organization records from year-to-year, and notify the University when there is a leadership transition during the year.
7. Operate for the benefit of its members and the University.

Removal of Recognition

The University reserves the right to remove a group's recognition for cause at any time.

RSO Name

The RSO name must be one that will not be confused with another club already in existence on campus. It should be appropriate to the purposes of the RSO and clearly indicate the RSO's objectives. Use of the University name within your RSO name is generally not permitted, except to identify location.

For example:

Not OK- University of the Pacific Chess Club vs. OK- Chess Club at University of the Pacific.

Part 1: Registration (cont'd)

Advisor

Each RSO must select an advisor from McGeorge's full-time faculty or staff. A RSO advisor is someone who provides support and guidance to officers and members of a student organization, generally on a volunteer basis. Along with the RSO's President, the advisor serves as a representative of the group in an official capacity. The following are guiding principles regarding the advisor's role:

1. The advisor's primary duty is to serve as a role model, mentor and resource. The advisor should demonstrate skills in ethics, communication, organizational development and leadership, help ensure that the group examines all sides of an issue, and aid student leaders with seeing different viewpoints. **An advisor should therefore be available and approachable to the group's officers and members. The advisor also serves as a Campus Security Authority under the Clery Act.**
2. Because student turnover is high, the advisor should help educate new officers about the mission and purpose of the RSO. The advisor should make sure that from year-to-year the RSO is fulfilling its stated purpose and that the events it sponsors are consistent with the overall mission of the University. **This involves reviewing the mission and purpose of the RSO at the beginning of each academic year.**
3. The advisor should oversee the activities of the RSO, including but not limited to the events it sponsors, the means by which it advertises events, and the content of those advertisements. Advisors should also give advice on responsible fiscal management. **Advisors are therefore encouraged to communicate regularly with club officers (suggested: at least monthly), and encouraged to attend club activities when possible (suggested: at least once per term).**
4. The advisor should be knowledgeable of campus resources and policies, and should consult with the Office of Student Affairs as questions arise. An advisor should not do the work of the student-leaders. **This means that despite an advisor's best efforts, student groups will sometimes fail. Rather than simply doing the work for them, often the most valuable option is to help the students learn from these mistakes and grow as leaders.**

Advising a student organization can be a very rewarding experience for faculty and staff members. Working closely with students outside the classroom creates long-lasting bonds, and allows the advisor to encourage the development of skills in leadership, ethics, teamwork, appreciation of diversity, and self-discovery that are invaluable to students when they leave McGeorge.

Part of the annual Registration process is filling out and submitting a RSO Advisor Agreement Form. This form requires the signature of both the club President and the advisor, and serves as a contract between the student, advisor, and Law School, indicating that all parties agree to this formal relationship. **In addition to the Form, there is a training that advisors are required to complete on an every-other-year basis.**

Part 1: Registration (cont'd)

Constitution and Bylaws

Each RSO must have a constitution and/or bylaws. These documents should be simple and should contain anything necessary for the permanent, ongoing functions of your group. To be considered effective, amendments must be reviewed and approved by the University. Organizations are encouraged to review their constitution annually to ensure that it continues to reflect the mission of the organizations and all of its operational details.

At a minimum, please ensure your governing documents address the following items:

- | | |
|--|---|
| <input type="checkbox"/> Name of organization | <input type="checkbox"/> Removal from office |
| <input type="checkbox"/> Purpose of organization | <input type="checkbox"/> Meetings |
| <input type="checkbox"/> Full non-discrimination statement | <input type="checkbox"/> Quorum |
| <input type="checkbox"/> Membership | <input type="checkbox"/> Dues, if applicable |
| <input type="checkbox"/> Officers | <input type="checkbox"/> Advisor role and selection |
| <input type="checkbox"/> Elections and appointments | <input type="checkbox"/> Amendment |

Liability

The responsibility of officers for the activities of their organization includes the individual responsibility of each officer for payment in full of debts incurred by the organization. McGeorge does not sponsor RSOs and therefore does not accept liability for their activities or for damages to person or property resulting from activities sponsored by a RSO. RSOs should inform members and those doing business with the organization that it is not University-sponsored and that the University assumes no responsibility for its activities.

Contracts

RSOs may not enter into contracts. All contracts are to be reviewed and signed by the Dean of Students.

Record Keeping

RSOs should keep records of membership information, finances, past events and activities, pictures, flyers, programs, emails, forms, etc. This information will ensure that the transition from year-to-year is smooth and will aid your organization in maintaining its unique identity for years to come. It is especially important to keep clear and accurate financial records. Historical financial records should be kept for a minimum of two years. **Throughout the year, groups may be audited by the University, including but not limited to, when there is reason to believe there has been mismanagement of RSO funds or a policy violation.** RSO officers may be held personally liable for misused funds.

Part 1: Registration (cont'd)

Mailboxes

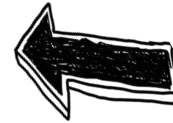
Each RSO has a mailbox in the CASE Office. You may access your group's mailbox any time the office is open (generally 9:00 a.m. – 6:00 p.m.). Please check your mailbox regularly. The Office of Student Affairs reserves the right to discard or return mail to the sender if a RSO's mailbox becomes too full.

Your RSO's mailing address is:

Your RSO's Name (This is important!)

Office of Student Affairs

University of the Pacific,
McGeorge School of Law
3200 5th Avenue
Sacramento, CA 95817



Part 2: Events & Activities

In its continuing effort to foster a sense of community, Pacific recognizes the desirability of making its facilities available to RSOs for meetings, events, and other activities related to the purpose of the RSO and the educational purpose of the University.

Approval

CASE coordinates RSO scheduling and must approve all on- and off-campus RSO events, meetings, tabling, and other activities. To make a scheduling request, fill out the online *Event Request Form*. McGeorge has formulated policies to maximize the availability of facilities while also protecting and maintaining the resources and educational purpose of the University. RSO meetings, events, and activities must be held in accessible facilities.

Please note that there is no such thing as an “informal” event when it’s sponsored and advertised by a RSO. All events - big or small - need to be submitted for approval.

Plan Early for Large Events (50+ Attendees)

RSOs should plan and calendar large events (those with more than 50 attendees) prior to the start of the semester. Fall planning should take place over the summer, and Spring planning should take place during the Fall. Planning this far in advance is essential, given the large number of campus activities each year and the need for coordination between groups.

Two Weeks Minimum for Small Events and Meetings

The *Event Request Form* should be submitted a minimum of two weeks in advance. This applies to on- and off-campus events, meetings, tabling, and any other activities. Although only two weeks is required, groups are strongly encouraged to schedule activities in the earliest stages of your planning process. Rooms are distributed on a first-come, first-served basis, and the campus calendar is managed carefully so as to minimize conflicts and maximize event attendance.

Minor Training

All events involving and/or hosting minors require the completion of Risk Management’s online *Minor Training course*. Contact CASE to make arrangements.

Damage to Event Facilities

RSOs may be held responsible for damage to any event facilities. Depending upon the circumstances, damage could result in fines or disciplinary action up to and including suspension or dismissal, and/or suspension of RSO status.

Part 2: Events & Activities (cont'd)

Tabling

RSOs may occasionally reserve a Student Center table for the purpose of sharing information about their group, increasing membership, promoting an upcoming event, or expressing ideas. Tabling requests should be submitted using the *Event Request Form* a minimum of two (2) weeks in advance and the following guidelines apply:

1. RSOs may have materials relating to their RSO's purpose available for distribution or purchase.
2. Absolutely no pressure or harassment of students will be permitted. Under no circumstances may literature or other items be carried around the campus or in the residence buildings for distribution or sale. Commercial sales and activities are strictly prohibited.
3. Reserved tables may not be left unattended. McGeorge reserves the right to remove unattended materials and will do so at regular intervals.
4. Displays and activities associated with the table reservation cannot block the free flow of traffic or encroach on another table.
5. Posting is not permitted on walls, windows, or receptacles, but posters may be attached to the table using masking tape or weights.

Athletic Activities

Groups that wish to host an athletic event or activity must receive approval from CASE (fill out the *Event Request Form*) and all participants must sign a waiver. Using this form alerts participants to the risks involved and places responsibility for the actions of the individual upon the participant. Signed waivers need to be given to CASE immediately after your activity. Contact the CASE prior to your event to make arrangements.

Demonstrations and Peaceful Protests

The University remains committed to supporting the personal and leadership development of all Pacific students through the exchange of diverse views and ideas. We acknowledge that in times of political turmoil and uncertain change, our students may feel the need and responsibility to ensure their voices are heard. The University has dedicated resources and information available to assist students who desire to peacefully protest or demonstrate on campus. In order to create a safe environment for all students while providing an opportunity for students to express their concerns, ideas and values, a formal system is in place. **If your RSO would like to organize a peaceful protest on campus, contact CASE to make arrangements.**

Part 2: Events & Activities (cont'd)

Career-Related Events

If your group would like to plan a career-related event, the Career Development Office (CDO) welcomes you to contact them for assistance. Email lawcareers@pacific.edu at the earliest phase of your planning to request assistance. The earlier you contact the CDO, the more they can help.

Career-related events may include: practice-area focused events (e.g., a panel of speakers talking about employment law), networking receptions, mock interview programs, how to select a practice area (e.g., what sort of work does a criminal prosecutor do?), job hunting tips (e.g., learning about how to break into the field of Tax Law), job performance skills (e.g., how to be a good summer associate at a private law firm), and more.

CDO support for career-related events can run the gamut from minimal to full support, depending on your group's needs. For example, the CDO can help with selection of speakers, partial funding, or promotion of event through CDO Blog, email and flyers, and social media.

Alcohol

McGeorge recognizes that social experiences are an important part of the law school experience and that law students are responsible adults, capable of making appropriate personal choices. However, law students are attorneys in training, and substance abuse is both a significant problem in the legal profession generally and a major cause of disciplinary actions against attorneys. Accordingly, it is important that the school discourage the inappropriate use of alcoholic beverages by students and others at student group events. **If the policies regarding alcohol at events sponsored by student organizations is not observed, disciplinary action may be taken against the sponsoring RSO and the students who organized the event.**

Security

The Department of Public Safety, at their discretion, may require security officers at any event.

This may include events with: a large number of people, live bands, alcohol, or when community guests and/or minors are in attendance. Public Safety will determine the required number of security officers. Security officers may only be hired by, and are under the control of, Public Safety. There is no charge for security at on-campus events. For off-campus events, the RSO must bear the cost of security.

During the Event: Students who are organizing the events are expected to take charge and appropriately self-police. If alcohol is being served, the event organizers should refrain from drinking. Students should communicate with Public Safety when assistance is needed.

Event Termination: Public Safety may terminate any event which appears to warrant such an action, such as where there has been a complaint of excessive noise, disorderly conduct, excessive drinking, or any violation of University policy. If an event is terminated, disciplinary action may be taken against the sponsoring RSO and the students who organized the event.

Part 2: Events & Activities (cont'd)

Copyrighted Materials

McGeorge recognizes and complies with the Federal Copyright Act, which governs how copyrighted materials may be used. Often concerns arise in the area of movies. Videos and DVDs from your personal collection are for home use only. This is true regardless of whether or not admission is charged. **If your RSO wishes to show a movie on campus, you must obtain a "Public Performance License"** (generally the copyright holder will charge a fee for this license, which varies according to the size of your expected audience and other factors). **Contact CASE to make arrangements.**

Special Notes Regarding On-Campus Events

On-Campus Events May Not Interrupt Academic Activities

Academics always take priority over other activities. In no event will any use of campus facilities be permitted which might interrupt or conflict with the academic activities of the law school, including quiet study of individual students.

Alumni or High Profile Guests

If your group's event will include alumni or high profile guests, please notify CASE ahead of time. In certain cases, the Dean may wish to personally invite the individual or greet them when they arrive, or Public Safety may need to take extra precautions to ensure the guest's safety.

Amplified Sound

Amplified sound is only permitted when no classes within earshot are in session and, regardless of time of day, sounds may not interfere with normal operations of the Sacramento Campus.

McGeorge retains the right to control all volume levels. Please be considerate of the fact that people study and live on campus.

Animals

Animals are permitted on campus under the following limitations:

1. The animal must be licensed and wear a current tag.
2. The animal must be on a leash and be supervised by an adult at all times. It is the responsibility of the adult supervising the animal to promptly and properly dispose of any waste.
3. Animals are not permitted in any buildings on campus. Exceptions are made for animals provided by licensed service animal agencies and any animal allowed under the McGeorge Service/Companion Animal Agreement.

Part 2: Events & Activities (cont'd)

Special Notes Regarding On-Campus Events (cont'd)

Campus Artwork

All works of art displayed in public areas of the University are part of the school's permanent collection and may not be removed or replaced.

Decorations

Use of masking tape or painter's tape is permitted to hang decorations, but must be removed by the RSO afterwards. All other forms of tape (including duct tape and packing tape), or staples, tacks, nails, glue, screws, etc. are NOT permitted as they are likely to cause damage. Decorations may not obstruct use of exits or fire protection equipment. Open flames are prohibited.

Food (Bon Appétit)

When having an event on-campus, Bon Appétit is the preferred caterer under the following guidelines:

Catering Under \$250 (RSO/SBA Events Only): If the food for your on-campus event will cost less than \$250 (including all expenses, food, drinks, cups, plates, etc.), you may purchase it from an outside vendor, such as a local restaurant, or you can order catering through Bon Appétit.

Catering Over \$250: If the food for your on-campus event will cost more than \$250, Bon Appétit has exclusive caterings rights to provide for your event. **Contact Catering Manager, Kevin Hennessy, at Kevin.Hennessy@cafebonappetit.com well in advance of your event to make arrangements or for additional information.** Under special circumstances, there are situations where a third-party-caterer can provide services on the Sacramento Campus. The use of an external caterer must be approved by the Sacramento Campus Director, Patrick Faverty (pfaverty@pacific.edu or 916-520-7472) or the Sacramento Director of Facilities, David Lambertson (dlambertson@pacific.edu or 916-739-7145).

Potlucks: RSOs are strictly prohibited from hosting potlucks on-campus, unless the event is small, limited exclusively to members of your group, and RSO/University funds are not used to purchase any food. Bon Appetit is not allowed to store or warm food for a potluck.

BBQ's: RSOs may host BBQ's on-campus where students do the cooking, so long as the student who is supervising the BBQing has completed a food handler training course and has submitted a copy of their up-to-date Food Handler License to Bon Appétit prior to their event. Training courses are available online for a minimal cost. The food to be BBQed must generally still be purchased through Bon Appétit, however, and RSO officers must also sign a waiver with Bon Appétit when they pick up the food. Contact Catering Manager, Kevin Hennessy, at Kevin.Hennessy@cafebonappetit.com well in advance of your event to make arrangements.

Part 2: Events & Activities (cont'd)

Special Notes Regarding On-Campus Events (cont'd)

Serving Alcoholic Beverages On Campus

If your group would like to serve alcohol at your on-campus event, there are two steps that must be completed a minimum of one (1) week prior to your event:

1. **Submit the online *Application to Serve Alcoholic Beverages Form***; and
2. **Submit a signed copy of the two-page Alcohol Policy to CASE.** The Alcohol Policy needs to be signed by both the Club President and Advisor. (You can either download and print the PDF from the CASE Canvas site, or pick up a paper version from the Office.)

The Assistant Dean for Student Affairs has the discretion to approve or deny the request, to limit the amount of alcohol purchased, to restrict the location of the event, and to restrict the time and/or manner in which beer and wine is served. The group will be notified via email about the status of its application. In some cases, an in-person meeting may be necessary to discuss specific aspects of your request.

Student groups that are approved to serve alcohol at an on-campus event must observe the following requirements:

1. Student groups may only serve beer and wine. All alcohol must be purchased through Bon Appétit and served by qualified Bon Appétit employees at the student group's cost.
2. Alcohol may only be served between the following hours: Monday-Friday: 5:00-11:00 pm, and Saturday and Sunday: Noon-11:00 pm Time of service may not exceed four hours.
3. Each person attending the event may be served a maximum of two servings of beer or wine. No glass of beer may exceed 12 ounces and no glass of wine may exceed 5 ounces. The sponsoring group must provide a system for enforcement of this requirement, such as marking attendees' hands.
4. Non-alcoholic beverages must be made available to event attendees at all times when alcoholic beverages are being served. If the non-alcoholic beverages are being sold, they must be sold at the same price or lower than the alcoholic beverages.
5. Substantial food items must be made available to event attendees at all times whenever alcohol is being served. If the food runs out, the alcohol service must cease.
6. Two non-drinking student-officers or other representatives of the sponsoring group must be present at all times where beer or wine is being served.
7. Alcohol may be served only to persons 21 years of age or older.
8. The event may not be open to the public; only McGeorge students and employees, and their escorted guests may attend the event.
9. The sponsoring group must prevent participants from taking alcoholic beverages to and from the event.

Part 2: Events & Activities (cont'd)

Special Notes Regarding On-Campus Events (cont'd)

Buildings & Grounds

Buildings & Grounds assists RSOs with setup and breakdown, provides equipment (tables, chairs, garbage and recycling cans, volleyball net, BBQs, risers-they have three 4'x8' risers), turns sprinklers on/off, and adjusts room temperature. To make arrangements, contact Paul DeMersseman well in advance at 916-835-3559 (cell) or pdemersseman@pacific.edu.

Media Resources

Media Resources assists RSOs with DVD player setup for movies, microphones and podiums for guest speakers, and, depending on the nature of the event, may be able to provide equipment for video or audio recording. These services are available Mon-Fri during normal business hours. To make arrangements, call 916-739-7005 well in advance. Please note that Media Resources does not provide speakers for playing music in the Student Center.

Special Notes Regarding Off-Campus Events

Accessibility at Off-Campus Events

All RSO-sponsored events should be held in locations that are fully accessible to all, including those with physical limitations. All venues have site contacts that should be able to tell you whether their facility is accessible, including their restroom facilities and parking areas.

Insurance for Off-Campus Events

Sometimes off-campus venues will require proof of insurance. **Pacific's Office of Insurance and Risk Management can provide assistance.** Contact CASE to make arrangements.

Alcohol at Off-Campus Events

Student groups that sponsor off-campus events where alcohol will be served are cautioned to act responsibly and to take measures to ensure the safety of all attendees. **If your group is sponsoring an off-campus event where alcoholic beverages will be served and Public Safety will not be providing security, all advertising for the event must conspicuously state:** "McGeorge School of Law is not sponsoring or providing security for this event."

Travel Policy

RSOs that wish to travel/carpool need to complete the University's Travel Form. This form will require you to provide information about the individual coordinating the trip, where you are going, and the purpose for your trip. Additionally, those who are driving will need to be identified, as well as those who will be passengers. This completed form, together with signed liability waivers, must be turned in to the CASE Office at least 5 working days prior to your trip. Contact CASE to obtain the necessary forms as early as possible.

Part 3: Marketing

Sacramento Campus Print Shop

The Sacramento Campus Print Shop provides printing, reproduction, binding, laminating, folding and paper-cutting services at very reasonable prices. To use these services contact Dan DeGroot, Print Shop Manager at 916-739-7237 or ddegroot@pacific.edu. Dan appreciates when you're able to give him several days of time to complete your print job - some times during the semester are very busy and he often cannot accommodate same-day orders.

Campus Posting Policy

RSOs may post printed materials on-campus, within the following guidelines:

1. **Only events and activities that have been approved by CASE may be advertised.**
2. **Include all relevant information** (date, time, location, names of guest speakers, name of sponsoring-RSO, contact information, etc.).
3. **Keep it professional.** All postings must be appropriate for a law school, as determined by the Assistant Dean for Student Affairs.
4. **If there will be a raffle or auction**, postings must specify where the monies raised will go and how they will be used.
5. **All flyers must have the ADA statement:** "If you need reasonable accommodations to participate in this event, you are asked to contact [Event Coordinator's name, number, and email] at least 3 business days in advance."
6. **If alcohol will be served off-campus and McGeorge is not providing security:** postings must state "McGeorge School of Law is not sponsoring or providing security for this event."

Printed materials may be posted on uncommitted bulletin board space, including the boards between A and B, by C, between G and H, and in the Student Center, CDO, Student Affairs, and CASE. RSOs may also drop off 1-3 copies of your flyer at the **Library front desk** for posting, and **may ask McGeorge faculty** if they're willing to post a flyer on their office bulletin board. **No printed materials may be attached to any surfaces other than those designated above.** Any such material will be removed. McGeorge reserves the right to remove any materials posted anywhere upon the law school's property and does so at regular intervals.

RSOs may not:

- X **Write on Chalkboards:** In no event does the administration authorize use of classroom chalkboard space for any announcement whatsoever, except those relating to the curriculum of the Law School. Individual members of the faculty, however, are at liberty to permit use of chalkboard space or to erase any announcements on chalkboards.
- X **Post materials on classroom doors.**
- X **Leave unattended printed materials on Student Center tables.**

Part 3: Marketing (con't)

Communication Resources

Effective communication with members is a necessary but difficult aspect of leadership. To aid your group with communication, CASE coordinates with McGeorge's Office of Marketing and Communications as well as the University's IT Department to offer a number of resources including:

- ✓ The ability to have a **website (blog)** at blogs.mcgeorge.edu/RSOName,
- ✓ The ability to create a **TWEN page** through Westlaw;
- ✓ The ability to post announcements and events in **The Docket**; and
- ✓ **Links on this page:** mcgeorge.edu/Students/Student_Life/Student_Organizations.htm to your group's primary contact person, as well as your recognized blog, TWEN, Facebook, Twitter, LinkedIn, Flickr, and/or other social media accounts.

Websites (Blogs)

The Marketing and Communications Department wants to help your RSO get online so you can communicate your group's purpose and events, while also ensuring that the law school is consistently represented and that your RSO maintains continuity in its web presence as officers graduate and new members join.

The RSO websites are created using the Wordpress interface, which is reasonably easy to use, even for those without prior website experience. Through Wordpress you can either set up your site to look like a website or a blog - or both.

To request that a website be set up for your RSO, please fill out the *Social Media Account and Website Application*: blogs.mcgeorge.edu/social/social-application. If you have any questions, please contact CASE or Pacific's Webmaster, Svend Holst at sholst@pacific.edu.

TWEN

If you would like to create a TWEN page for your RSO, please contact Monica Sharum in the Library at msharum@pacific.edu.

The Docket

Events on the Student Calendar are automatically included in The Docket based on the information you provided in your *Event Request Form*. If you need to update your event information or you'd like to send an announcement or deadline for inclusion in The Docket, please email CASE.

Social Media Recognition

If your group has a social media account on Facebook, Twitter, Instagram, LinkedIn, etc., please fill out the *Social Media Account and Website Application*: blogs.mcgeorge.edu/social/social-application.

Part 3: Marketing (con't)

Shout Outs on McGeorge's Social Media & Newsroom

Want your group to be featured on the McGeorge Facebook, Instagram, Twitter, or Flickr?

Send Bethany Daniels (bdaniels@pacific.edu), Director of Marketing and Communications, a draft of what you would like to see posted (bullet points are fine) and a picture to go along with the post.

McGeorge Wordmarks, Logos & Seals

RSOs may use the McGeorge logo, wordmarks, and seal within the acceptable uses outlined in McGeorge's Identity Standards and Style Guide. **Under no circumstances may the wordmark, logo or seal be s t r e t c h e d or altered in any way.**

Annual Club Recruitment Fair During Orientation

One of the most effective ways to publicize your RSO is to participate in the Club Recruitment Fair during Orientation! Please be sure to submit your group's *Registration Form* and *Advisor Agreement Form* by April 25, 2017 (the last day of classes) so your group is eligible to participate. Each group who participates in the fair will receive 1 table and 2 chairs in a randomly assigned location on the Quad. We encourage you to bring a tablecloth, banner, fun decorations, sign-up sheet, flyers, etc., to make your table look snazzy and stand out from the crowd. We also encourage groups to bring a shade device, such as a pop-up tent, as August in Sacramento is usually sunny and HOT!

Part 4: Money Management

Agency Account (On-Campus Bank Account)

RSOs must have an account with the University for processing financial transactions and obtaining campus services. These accounts are referred to as "Agency Accounts". Off-campus bank accounts are strictly prohibited. Your Agency Account has no annual fees or interest and your balance is carried over from one year to the next, unless your group goes inactive.

Account statements are provided by request (ask the Business Office for your group's "Summary and Detail Report"). After a group becomes inactive, its agency account will be closed and any remaining funds will be reallocated the semester following their inactivity. RSOs University accounts must be paid in full before they may host or schedule an activity or event on campus. Additionally, all rights and privileges will be temporarily suspended until accounts are cleared.

Index Code

Each Agency Account is assigned a unique Index Code beginning with N303__. You should write this number down because you will need it regularly throughout the year. It's akin to your bank account number, so regulate carefully who has access to this number to ensure its proper use.

Signature Form (Authorized Signatories)

Before any financial transactions can be processed, your RSO must submit a Signature Form. This form tells us who is taking responsibility for managing your club's account this year, and who has signature authority. A minimum of three (3) officers must sign the Signature Form, and it must be submitted to CASE before the registration deadline on October 1.

New groups will also need to attach a Request To Open An Account Form and your RSOs Constitution to the Signature Form. These three items should be submitted to CASE as a single packet. You will be notified once your group's agency account has been established.

Deposits

Any income generated by the RSO must be deposited within 24 hours. Money collected over the weekend should be given to Public Safety to keep in their safe until it can be safely deposited into your club's account on Monday. The Business Office has a *Deposit Form* for you to fill out when you are depositing money into a club account.

Part 4: Money Management (con't)

Internal (On-Campus) Charges

The Print Shop, Public Safety, and other campus departments will use your index code to directly bill your RSO. No money exchanges hands; rather, a *Journal Entry Form* is completed to transfer money from one index code to the other. This form is also how you transfer money from one club to another. Contact CASE for assistance with preparing this form.

The Treasurer's Role

The Treasurer plays a vital role for the organization. Treasurers should:

- ✓ Attend any mandatory trainings offered.
- ✓ Create a budget and keep it up-to-date.
- ✓ Complete financial transactions in a timely manner (within 30 days).
- ✓ Promptly notify CASE of any issues that arise.
- ✓ Keep organized records. At a minimum, keep a simple running spreadsheet like this one:

Date	Category	Transaction Description	Reimbursement to:	Payment	Deposit	Balance
8/1/17		Balance Forward				\$100.00
8/30/17	Food	August Club Meeting	President Suzie Smith	-\$60.00		\$40.00
9/3/17	Publicity	Printing Flyers for Event		-\$10.00		\$30.00
9/10/17	Dues	Deposit (Lim, Sarnowski, McGuire & Grodsky)			\$40.00	\$70.00

Finding Funding

RSOs are not automatically allocated money, however, one of the benefits of RSO status is the ability to apply for funding from the Student Bar Association (SBA). Each year the SBA Board of Governors sets specific policies and procedures for RSO funding requests. Please contact the SBA Treasurer for more information. Additional sources of revenue may include:

- ✓ **Dues.** RSOs generally collect dues ranging from \$5-\$40, depending on the group's activities.
- ✓ **Co-Sponsors.** Join forces with another group and pool your resources.
- ✓ **Regional or National Bar Associations.** The ABA has some funding available, and groups like the Sacramento County Bar Association are often interested in partnering with RSOs.
- ✓ **Affiliated organizations.** If your RSO is affiliated with an outside group, such as a national chapter, often the affiliated organization will be willing to provide financial assistance.
- ✓ **Fundraising.** Fundraising requires planning and approval! (See: "Fundraising" section.)

Part 4: Money Management (con't)

How does my club pay for things?

There are three options:

1. **Pay out-of-pocket and seek reimbursement** (most common),
2. **Pay by University credit card** (available for large expenses/items that can be purchased online or over the phone); or
3. **Pay by University check** (requires a minimum of two weeks for processing).

Reimbursements for Out-of-Pocket Expenses

1. RSO Board Approval: Before using personal funds to pay for anything on behalf of your group, the expenditure needs to be approved according to the internal procedures your group has specified in your Constitution. Typically, expenditures require the approval of a minimum of two board members.

2. University Approval: Only reasonable expenses incurred for University-approved events and activities in furtherance of a RSO's statement of purpose, consistent with the educational mission and policies of the University will be reimbursed. **Reasons a reimbursement may be denied include, but are not limited to, the following:**

- X Incorrectly filled out forms or incorrect number of copies (you can fix and resubmit).
- X Insufficient funds in the group's account.
- X Insufficient documentation was provided.
- X Reimbursement relates to an event or activity that was not approved under the policies and procedures set forth in this Manual.
- X Reimbursement would be inconsistent with University policy.

If your reimbursement is for \$100 OR LESS

1. KEEP YOUR RECEIPT!
2. Fill out a **Green Form** (requires the signatures of two Authorized Signatories).
3. **Tape** your original detailed receipt to a white 8.5x11 paper.
4. Make **one photocopy** of your Green Form and **one photocopy** of your receipt.
5. **Submit** your Green Form + Receipt + Photocopies to the CASE Office.
6. Your request will be reviewed for accuracy and appropriateness, then **signed and returned to your group's mailbox for the person being reimbursed to pick up** and bring into the Business Office for a cash reimbursement.

Part 4: Money Management (con't)

How does my club pay for things? (con't)

If your reimbursement is for MORE THAN \$100

1. KEEP YOUR RECEIPT!
2. Fill out a **Green Form** (requires the signatures of two Authorized Signatories).
3. Fill out an **Expense & Reimbursement Form** (available on Business Office website)
4. **Tape** your original detailed receipt to a white 8.5x11 paper.
5. Make **two photocopies** of your Green Form, **two photocopies** of your Reimbursement Form, and **two photocopies** of your receipt.
6. **Submit** your Green Form + Reimbursement Form + Receipt + Photocopies to CASE.
7. Your request will be reviewed for accuracy and appropriateness, then **signed and submitted to the Business Office for a check reimbursement**. If you have direct deposit set up, the money will be directly deposited into your account.

How to fill out the Expense & Reimbursement Form

- ✓ **Name** (name of the person to be reimbursed)
- ✓ **Banner ID No.** (989# of the person to be reimbursed)
- ✓ **Address** (address of the person to be reimbursed)
- ✓ **Department** (your RSO's name)
- ✓ **Purpose** (why did your RSO spend this money? Include- who, what, where, when why)
- ✓ **Commodity Code** (always use "A062")
- ✓ **Index Code** (your RSO's index code - it starts with N303...)
- ✓ **Out of Pocket Column** (total amount you spent - it will automatically fill in the other \$ info)
- ✓ **Signed** (signature of the person to be reimbursed)

Reimbursements for Gift Cards

To get reimbursed for buying a gift card, a Gift Card Log must be filled out and attached to your reimbursement request, in addition to your receipt. The log will ask you to provide the following information: Date, Payee (name of club), Recipient of gift card (name), 989# of the recipient, Gift card type, Gift card amount (must be less than \$50), Purpose (why did your club give away this gift card?). **Be sure to collect all of this information before you give out the gift card, or you will not be able to get reimbursed.**

Receipts/Lost Receipts

All receipts must be original and fewer than 30 days old. A copy of your personal check or credit card statement is not acceptable. Always use the most detailed receipt available. Occasionally a person may lose a receipt. If this happens, fill out a *Lost/Missing Receipt Affidavit* and submit it to CASE with your reimbursement forms in lieu of a receipt.

Part 4: Money Management (con't)

How does my club pay for things? (con't)

Payment by University Credit Card

The Office of Student Affairs has a “procard” (University credit card) that may be used to make purchases on behalf of a RSO. Money spent will be deducted directly from your RSO's agency account and your group must have sufficient funds to cover this expense. This method of payment is good for online orders (such as buying t-shirts for your group) or large expenses (such as rental fees for a Barrister's Ball Venue). Please contact Kelli Sarnowski at ksarnowski@pacific.edu to make arrangements if you'd like to use the procard. She would greatly appreciate several days of advance notice.

Payment by University Check to an Approved Vendor

One difference between your University agency account versus a checking account at a bank is that you cannot have a checkbook or debit card. To have a check issued, you need to complete the following steps:

1. Fill out a **Green Form** (requires the signatures of two Authorized Signatories).
2. Fill out an **Authorization for Payment Form** (available on Business Office website)
3. Have an **invoice** or other documentation regarding this expense.
4. Make **two photocopies** of your Green Form, **two photocopies** of your Authorization for Payment Form, and **two photocopies** of your invoice.
5. **Submit** your Green Form + Authorization for Pmt Form + Invoice + Photocopies to CASE.
6. Your request will be reviewed for accuracy and appropriateness, then **signed and submitted to the Business Office for a check to be cut**. Please note that the check will be sent directly to the vendor and it takes approximately two to three week for that to happen.

How to fill out the Authorization for Payment Form

- ✓ **Date** (today's date)
- ✓ **Banner ID No.** (989# of the University-approved vendor to be paid - if the vendor has not previously been approved and issued a Banner ID number, then you also need to fill out a *Vendor Information Form* - contact Tia Vang at tvang@pacific.edu with questions)
- ✓ **Pay to Name** (name associated with the Banner ID No.)
- ✓ **Remittance Address** (where to send the check)
- ✓ **Invoice Number** (or if none is listed, then use today's date "051317")
- ✓ **Commodity Code** (always use "A062")
- ✓ **Invoice Ammount** (total amount to be paid)
- ✓ **Index Code** (your RSO's index code - it starts with N303...)
- ✓ **Business Purpose** (why is your RSO spending this money? Include- who, what, where, when why)
- ✓ **Prepared by** (the person filling out the form)

Part 4: Money Management (con't)

Paying an Individual for Services

When you are paying an individual for services (such as a DJ or a yoga teacher), in some instances the individual will be considered an independent contractor and in other instances they will need to become a temp-casual employee of the University. This determination is made on a case-by-case basis by Human Resources. This process can take several weeks (at a minimum), so it is necessary to start early. Please contact Laura Allen from Human Resources with questions at lallen9@pacific.edu or 916-739-7028.

Cash Box Rental

CASE has two cash boxes that may be checked out on the honor system on a first-come-first-served basis. If the cash box is not returned in good condition and in a timely manner, your group may be charged for the cost of replacement.

Accepting Credit Card Payments

CASHNet is Pacific's eCommerce and credit card processing solution. **CASHNet solutions are the only University-approved methods of accepting credit card payments.** There are two options:

1. CASHNet eMarket allows you to create an **online store** for your group, where, with approval, you can have members pay dues, sell tickets to events, and more.
2. CASHNet's Virtual Terminal product called Assisted Payments allows you to **process credit card payments on the go, such as at an event with an auction.**

All revenue collected via CASHNet automatically posts to your RSO's Agency Account, making this an extremely simple method of collecting payments.

Please note however that Bank Discount Fees will be deducted from your account. The discount rate comprises a number of dues, fees, assessments and network charges merchants (such as Pacific) are required to pay for accepting credit and debit card payments. Pacific's bank discounts hover around 2.2% of the total transaction revenue of your event and are applicable to all credit card processing at Pacific. Any time your RSO uses CASHNet to accept credit card payments the bank discount fee will be automatically applied by the Office of Financial Reporting when a reconciliation of credit card use is processed at the end of each month.

To set up a CASHNet site for your group, please fill out the CASHNet Request Form at least one (1) week in advance of when you need to start collecting payments.

Gambling

All gambling is strictly prohibited, except as otherwise provided in this Manual.

Part 4: Money Management (con't)

Fiscal Year

The University fiscal year runs from July 1 to June 30. RSO officers are responsible for keeping track of their account activity throughout the fiscal year and should promptly bring any problems to CASE's attention when they arise, rather than waiting until the end of the fiscal year. **Reimbursements from a prior fiscal year will not be approved.**

Financial Inspections & Audits

RSOs are expected to keep complete and accurate financial records, which are to be current and available for inspection at any time. Historical financial records should be kept for a minimum of two years. Throughout the year, groups may be audited by the Office of Student Affairs, including but not limited to, when there is reason to believe there has been mismanagement of RSO funds or a policy violation. RSO officers may be held personally liable for misused funds.

Part 5: Fundraising

The term “fundraising” refers to efforts by RSOs to raise additional funds for their activities through solicitation of donation, admission charges, ticket sales, or the selling of various goods and/or services. There shall be an established secure process for handling money during any fundraiser, and any revenue collected from fundraising must be promptly deposited in your RSO's agency account to ensure traceability and transparency with regard to the funds generated. **If your group would like to organize a fundraiser, please reach out to CASE to discuss your plans.**

Soliciting for Donations

The Office of Advancement is the clearinghouse for all McGeorge development outreach. RSOs are asked to coordinate their messages with the Office of Advancement and receive approval before starting to fundraise.

Please reach out to Sally Cebreros, Development Officer, for approval at scebreros@pacific.edu or 916-739-7391. When you contact Sally, it would be helpful to include a description of your fundraising plans, the list of the people and places you'd like to solicit, and your solicitation letter/marketing materials, to the extent that those are available.

Your request will be reviewed by the Office of Advancement to ensure that your plans comply with McGeorge's standards and mission and IRS regulations for 501(c)(3) organizations. Your list of places to solicit will also be reviewed for conflicts with other fundraising efforts.

Donations of Gifts-In-Kind (Goods)

Once your group receives approval to fundraise, the Office of Advancement will provide you with a personalized “Gift-In-Kind Donation Form”, which will be filled out by each donor and used by the University to process their gift and generate a gift receipt.

Note - Not every gift is tax deductible!

- X Non-tangible items and gifts of services are not tax deductible (for example: a DJ playing music).
- X Discounts for tangible items are not tax deductible (for example: a card for ½ off a cup of coffee).

IRS Gift Receipts for Donors

The University is a 501(c)(3) nonprofit organization and the Law School, including its RSOs, fall under that designation. Donations to your group can be tax-deductible if you:

1. Seek and receive approval to fundraise in a timely manner.
2. Submit cash/check donations directly to the Office of Advancement accompanied by the following information: (1) donor name, and (2) donor mailing addresses.
3. Submit a filled out “Gift-In-Kind Donation Form” to the Office of Advancement for each donated gift-in-kind.
4. Fundraise for the benefit of the University (not for an external charity).

Part 5: Fundraising (cont'd)

Fundraising to Benefit an External Charity

RSOs that wish to fundraise for the benefit of an outside charity must receive authorization from that charity to raise funds on its behalf. Requests by RSOs that wish to fundraise on-campus for the benefit of an outside charity (either through the collection of money or goods) will be approved by Assistant Dean for Student Affairs on a case-by-case basis. Fundraising for an external organization's benefit is not tax-deductible for donors under the University's Tax ID.

Donor Recognition

Donors to the University are recognized in many ways: (1) in the annual University Donor Honor Roll, which appears in Pacific magazine, (2) in the Law School's Pacific Law magazine, (3) on the McGeorge website donor honor roll, and (4) the firm/donor name is listed on the Law School's Wall of Honor, in the Administration Building. **We highly recommend that you also send your donors a personalized thank you letter.**

Auctions

Live and silent auctions of donated goods to raise funds for charitable purposes are permitted on a limited basis. RSO auctions must comply with the following requirements:

1. **All auctions should be approved by the Assistant Dean for Student Affairs in advance.**
2. **All donated goods must be collected according to the procedures in this Manual.**
3. **All advertisements must include language indicating where the proceeds of the raffle will go, and what they will benefit.** (For example: "Auction proceeds will go to Lambda to fund future events.")

When a donated item is sold at an auction, the charitable (tax deductible) portion is the amount over Fair Market Value. Individuals who purchase an item at a charitable auction for more than FMV can be provided a receipt by McGeorge, if the RSO provides the following information to the Office of Advancement:

1. Name of purchaser,
2. Mailing address of purchaser,
3. Product/Goods description,
4. Donor provided value of the item purchased, and
5. Amount paid.

Part 5: Fundraising (cont'd)

Raffles

California Penal Code Section 320.5 describes the requirements pertaining to charitable raffles (in other words, a raffle is a type of lottery in which prizes are awarded to people who pay for a chance to win). **Under this code section, if your organization wants to host a raffle, it would need to register with the California Attorney General's Office in advance of the beginning of the state's fiscal year (prior to Sept. 1).** Registration requires a \$20 annual fee and can be completed online. Your organization would also need to submit a closeout summary report by Aug. 31 of the following year.

In addition to registration, this code section requires the following:

1. **California laws require that 90 percent of the gross proceeds raised go directly to beneficial or charitable programs ("90-10 Rule").** This means you are only allowed 10 percent of the gross proceeds to pay for expenses and the consignment cost of the raffled items. 50-50 raffles are illegal in California. You must follow the 90-10 rule.
2. **Wine is an allowable raffle item, but you need to register with the California ABC for a one day temporary permit (cost \$100).**
3. A raffle **may not be operated or conducted in any manner over the Internet**, nor may raffle tickets be sold, traded, or redeemed over the Internet.
4. Failure to comply with the provisions of section 320.5 is a misdemeanor.

However, a raffle is exempt from the above requirements if it satisfies all of the following:

1. It involves a general and indiscriminate distribution of the tickets.
2. The tickets that are distributed for free are offered on the same terms and conditions as the tickets for which a donation is given.
3. The scheme does not require any of the participants to pay for a chance to win.

Meaning, if someone requests a free raffle ticket, you give it to them, and you treat their free ticket exactly the same as if they had paid money. If you are hosting this type of drawing, the following rules apply:

1. **All raffles should be approved by the Assistant Dean for Student Affairs in advance.**
2. **All donated goods must be collected according to the procedures in this Manual.**
3. **All tickets and publicity materials must clearly indicate that no purchase is required.** If a dollar amount is specified, the word "donation" must also appear. (For example: "Suggested donation for 1 raffle ticket is \$1.")
4. **All advertisements must include language indicating where the proceeds of the raffle will go, and what they will benefit.** (For example: "Raffle proceeds will go to BLSA to fund future events.")
5. **Anyone requesting a free raffle ticket must be provided with one.**