

# **Student Organization Planning Checklist**

Office of Student Leadership & Engagement

# Table of Contents

<b>Before You Begin</b>	<b>3</b>
<b>Policies Overview</b>	<b>4</b>
<b>Expectations of University Recognized Organizations</b>	<b>5</b>
<b>Event Planning Timeline</b>	<b>6</b>
<b>Cover Sheet</b>	<b>7</b>
<b>Off Campus Events</b>	<b>8</b>
<b>Transportation</b>	<b>9</b>
<b>On Campus Room Reservations</b>	<b>10</b>
<b>Campus Demonstrations</b>	<b>11</b>
<b>Making Purchases</b>	<b>12</b>
<b>Bookstore Purchases</b>	<b>13</b>
<b>Collecting Money on Campus</b>	<b>13</b>
<b>Raffles</b>	<b>13</b>
<b>Food</b>	<b>14</b>
<b>Hofstra Contracts, Speakers, and Performers</b>	<b>15</b>
<b>Photographers &amp; Videographers</b>	<b>16</b>
<b>Apparel &amp; Promotional Items</b>	<b>17</b>
<b>Advertising</b>	<b>18</b>

# Before You Begin

Before you begin, make sure to check in with your Administrative Advisor.

## **Administrative Advisors**

### **Club Sports**

- Pat Montagano, Senior Assistant Dean of Students & Director of Campus Recreation
  - [Patricia.Montagano@hofstra.edu](mailto:Patricia.Montagano@hofstra.edu)
- Adrienne Kravitz, Associate Director of Campus Recreation
  - [Adrienne.R.Kravitz@hofstra.edu](mailto:Adrienne.R.Kravitz@hofstra.edu)

### **Fraternities & Sororities (FSL)**

- Alex Federico, Assistant Director for Fraternity & Sorority Life
  - [Alexandra.Federico@hofsta.edu](mailto:Alexandra.Federico@hofsta.edu)

### **Faith Based Organizations**

- Gillian Atkinson, Associate Director, Intercultural Engagement & Inclusion
  - [Gillian.Atkinson@hofstra.edu](mailto:Gillian.Atkinson@hofstra.edu)

### **Graduate Organizations**

- Stan Cherian, Associate Director for Student Leadership & Engagement
  - [Stanley.Cherian@hofstra.edu](mailto:Stanley.Cherian@hofstra.edu)

### **Honor Organizations**

- Denise DeGennaro, Assistant Director, Student Leadership & Engagement
  - [Denise.DeGennaro@hofstra.edu](mailto:Denise.DeGennaro@hofstra.edu)

### **Intercultural Organizations**

- Gillian Atkinson, Associate Director, Intercultural Engagement & Inclusion
  - [Gillian.Atkinson@hofstra.edu](mailto:Gillian.Atkinson@hofstra.edu)

### **Media Organizations**

- Denise Boneta, Associate Director for Student Leadership & Engagement
  - [Denise.M.Boneta@hofstra.edu](mailto:Denise.M.Boneta@hofstra.edu)

### **Performance Organizations**

- Samantha Kloeckener, Assistant Director, Student Leadership & Engagement
  - [Samantha.Kloeckener@hofstra.edu](mailto:Samantha.Kloeckener@hofstra.edu)

### **Politically-Socially Active Organizations**

- Amanda Del Gaudio, Assistant Director, LGBTQ+ Advocacy and Awareness
  - [Amanda.DelGaudio@hofstra.edu](mailto:Amanda.DelGaudio@hofstra.edu)

### **Pre-Professional Organizations (non-FSL)**

- Samantha Kloeckener, Assistant Director, Student Leadership & Engagement
  - [Samantha.Kloeckener@hofstra.edu](mailto:Samantha.Kloeckener@hofstra.edu)

### **Service Organizations**

- Kathleen Lieblich, Assistant Director for Student Advocacy and Prevention Awareness
  - [Kathleen.Lieblich@hofstra.edu](mailto:Kathleen.Lieblich@hofstra.edu)

### **Social/General Interest Organizations**

- Denise Boneta, Associate Director for Student Leadership & Engagement
  - [Denise.M.Boneta@hofstra.edu](mailto:Denise.M.Boneta@hofstra.edu)

### **Governance Organizations**

- Denise Boneta, Associate Director for Student Leadership & Engagement
  - [Denise.M.Boneta@hofstra.edu](mailto:Denise.M.Boneta@hofstra.edu)

# Policies Overview

The following websites and documents provide additional guidelines for student organization leaders. Items in the guide are subject to change. Please constantly refer to [hofstra.edu/OSLEpolicies](http://hofstra.edu/OSLEpolicies)

## Hofstra Policies and Guidelines

[Hofstra University Guide To Pride](#)

[The Living Factor](#)

[Hofstra USA Late Night Weekend Event Guidelines](#)

[University Style Guide](#)

[Flyer Policy](#)

## Student Government Association

If SGA recognized, please follow all SGA policies outlined in the SGA Policy Series.

[SGA Constitution](#)

[SGA Policy Series](#)

SGA Treasurer Packet- Given out at SGA Treasurer Trainings, be sure to attend one or email the Appropriations Chair at [sga\\_appropriations@pride.hofstra.edu](mailto:sga_appropriations@pride.hofstra.edu)

# Guidelines for Hofstra-Recognized Undergraduate Student Organizations

As a Hofstra-Organized Organization, all organization members agree to the following:

- Abide by all applicable University policies and local, state, and federal laws
  - Be open to all students of the University community without regard to any legally protected characteristic
  - Comply with the University's Anti-Hazing Policy and not conduct activities that violate the Policy
- Have at least a four person e-board with roles of President, Vice President, Secretary, and Treasurer filled
- Maintain an active roster of at least 15 members from various class years
- Maintain a full executive board (President, Vice President, Secretary, and Treasurer)
- Have all executive board members attend Title IX and Student Organization Leadership Training during the first semester serving in those roles
- Maintain and regularly update as needed organizational GetInvolvedHU (GIHU) page
- Review, update, and follow organization constitution
  - Current constitutions must be uploaded on GIHU page
  - Changes to constitutions need to be reviewed and approved by the organization's Administrative Advisor
- Hold regular e-board and general member meetings
  - Meetings must be identified on GIHU page
- Host at least two (2) events or initiatives per semester
- Meet with your administrative advisor twice (2) per semester
- Attend two (2) university wide events per year
- Log all service hours done by the organization through the Community Service Tracking Form located on GIHU
- Operate as not-for-profit groups without personal financial gain for individuals

\*All other organization requirements as set by category Administrative Advisor must also be met.

\*\*All Student Government Association (SGA) recognized clubs must meet all University requirements, as well as additional requirements as set by SGA. Requirements can be found in the SGA Policy Series.

Failure to meet any of the outlined University Recognition requirements can result in a student organization being put on probation or losing recognition. Organizations will be properly notified with warnings and/or updated status which will outline an appeal process. Appeals will be reviewed by the Associate Dean for Student Life and the Associate Director for Student Leadership and Engagement. Once an organization loses recognition, the organization is unable to seek recognition from the University for a full calendar year.

# Event Planning Timeline

## **Step One: Timeline**

When is the event? Can you complete ALL of the planning step and submit all required paperwork by the listed deadlines? If not, reconsider the date of the event.

## **Step Two: [Budget](#)**

How are you funding the event? What is the source of the funding? Have you considered all direct and indirect expenses associated with this event and do you have enough funds to cover all expenses for this event? To pay for an event, you might need to use a combination of [funding sources](#).

## **Step Three: [Space & Equipment](#)**

Where will the event take place? Have you reserved the space through the Office of Event Management? What additional approvals are required for the space based on location, time, type of activity, presence of outside guests, etc.? Will there be a need to rent additional tables and chairs? Will you need a stage or a tent or special furniture, and have you budgeted appropriately? Have you considered audio-visual (AV) needs or technical support? Are you familiar with the location of the event and its ability to fill AV needs (lights, music, sound, projections, etc.).

## **Step Four: [Food](#)**

Will you provide food at the event? Have you placed an order through Campus Dining Services? Has the food order been confirmed by your administrative advisor? Providing food from an off-campus vendor? You will need special permission.

## **Step Five: [Contracts](#)**

Are you bringing non-Hofstra affiliated individual(s) to provide a service for your event? Are you using one of the Hofstra contract templates?

## **Step Six: [Advertising](#)**

How will you publicize this event? Be sure to include your Who, What, Where, and When? Advertising approvals by the administrative advisor are usually completed within 48 hours.

## **Step Seven: [Money Drop](#)**

Collecting money at the event? If doing so after hours or on weekends, you will need to schedule a money drop at least 10 days prior to the event with the Office of Student Leadership and Engagement.

## **Step Eight: [Waivers](#)**

Does your event include high-risk activities for your participants (physical activity)? If so, you will need all participants to complete an activity waiver that is submitted to your administrative advisor by close of business the day following your event. Waivers are required for all off-campus events, regardless of activity type.

## Cover Sheet

**All paperwork submitted to OSLE**, no matter the combination, must include either an Undergraduate or Graduate Organization Cover Sheet.

- [Undergraduate Organization Cover Sheet \(Example\)](#)
- [Graduate Organization Cover Sheet](#)

# Off Campus Events

Every student organization that is traveling for an event, conference, competition, etc., should review the UG Student Travel Guidelines and Request Form to determine if a travel advisor is required to accompany students. In addition, off-campus trips require activity waivers for all participants that must be completed by participants and submitted to the organization's administrative advisor.

## Travel Request

Submit to Administrative Advisor

- [Cover Sheet](#)
- [Travel Request Guidelines and Form](#)

**DEADLINE: 2 weeks to the date of the trip**

## Waivers

- [Off-Campus Physical Activity Waiver](#)
- [Off-Campus Non-Physical Activity Waiver](#)

**DEADLINE: 3 business days before the trip begins**

## Conferences or Travel Reimbursement

*Both Travel Request and Waivers must be submitted prior*

Submit to Administrative Advisor

- [Cover Sheet](#)
- [Check Request Form \(example\)](#)
- Travel Expense Report (Provided by Advisor upon request)
- Receipts with correlating statements for purchases made with debit/credit card
- List of members who attended (spreadsheet that includes first and last name, 700 #, email)
- Print out from conference website that details information about the conference

*Note: Hotels can only be paid by the University if a contract is done.*

## Venues

Agreements with venues are considered contracts, and still must go through the contract process outlined below. *No student may sign any agreement with a vendor as a representative of the university.*

Submit to Administrative Advisor

- [Cover Sheet](#)
- [Contract Approval Form](#)
- [Contract Information Form](#)
- [Contract](#)
- [W-9](#)
- Copy of Menu
- Estimated Invoice
- Proof of Insurance
- Appropriate Payment Method Forms

**DEADLINE: Minimum of 4 weeks before the event. In case of vendor created contracts the time frame may take longer.**

# Transportation

## Bus

Hofstra University works with two pre-approved bus transportation providers: **Educational Bus Transport, Inc and Coach USA**. Other bus companies are not approved by the university, and may not be utilized without prior approval from the university Legal Affairs Office. The Long Island Railroad offers discounted group tickets if travelling in groups of 30 or more. If you're interested in using a bus company, contact your Administrative Advisor.

### Submit to Administrative Advisor

- [Cover Sheet](#)
- Itinerary
- Invoice
- List of Passengers & 700#s
- [Purchase Order Request](#)

**DEADLINE:** Minimum of 1 week before the trip begins. The company will not be paid until AFTER services have been rendered.

## Mileage

If traveling by car, you may be reimbursed according to the [IRS Standard Mileage Rate](#).

### Submit to Administrative Advisor

- [Cover Sheet](#)
- [Check Request Form \(example\)](#)
- List of Passengers & 700#s
- Map that includes trip mileage

**DEADLINE:** Minimum of 1 week before the trip begins. The company will not be paid until AFTER services have been rendered.

## Hofstra Shuttles

If you are interested in utilizing the Hofstra Shuttle please contact your Administrative Advisor.

# On Campus Room Reservations

## Guidelines

Each student club and organization is able to reserve space for their various events throughout the semester. These events can be meetings, lectures, guest speakers, etc. and can take place in variety of places throughout Hofstra University's campus.

- [Events Management Scheduling Guidelines for Student Organizations](#)

## Event Contact Form

Recognized student groups must designate either one or two club members to reserve space for an organization using. only these individuals can request space, update event information, or cancel events. The form must be completed each academic year or whenever individuals are added or removed. Anytime this contact form is submitted, you will be taking off your currently listed individuals. Before submitting this form, please confirm with your organization or Student Event Management if your contact form should be changed to avoid error.

- ☐ [Event Contact Form for Student Orgs](#)

## Room Request for Student Organizations

Submit Online to Events Management

- ☐ [Room Request for Student Organizations](#)

**DEADLINE: Minimum of 14 days before the event**

## Room Requests for Events Co-Sponsored with an Off-Campus Not-For-Profit Organizations

These events must be submitted by your Administrative Advisor. Please review the online form and set up a meeting with your Administrative Advisor to provide them with the details of the event.

- ☐ [Room Request for Events Co-Sponsored with an Off-Campus Not-for-Profit Organization](#)

## Atrium Tables

To reserve an Atrium Table please submit the online form linked below to OSLE.

[Atrium Table Request](#)

## HofUSA Late Night Weekend Events

Student organizations may request late night events to occur between the hours of 9:00 pm to 2:00 am, Friday and Saturday. All requests must follow the [Hofstra USA Late Night Weekend Event Guidelines](#) and be approved by your Administrative Advisor.

# Campus Demonstrations

Any student club or organization that wishes to sponsor a campus demonstration must complete a Campus Demonstration Proposal Form and return it to the Office of Student Leadership and Engagement in Room 244 of the Mack Student Center a minimum of seven days prior to the proposed date.

If you are unsure if your event needs a Campus Demonstration Proposal Form please contact your Administrative Advisor.

## Submit to Administrative Advisor

- [Cover Sheet](#)
- [Campus Demonstration Proposal Form](#)
- Description of Event
- Diagram of Event Set Up

**DEADLINE: Minimum of 7 business days before the event**

# Making Purchases

## Reimbursements

If you will be purchasing items with your personal funds you may get reimbursed from your organization's Hofstra account pending advisor, budget, and/or SGA approval.

### Submit to Administrative Advisor

- [Cover Sheet](#)
- [Check Request Form \(example\)](#)
- Original Itemized Receipt taped to an 8.5"x11" sheet of paper
  - If paid by credit/debit card the receipt must also list the last four digits of the card number
- Copy of the credit/debit card statement that needs to show the charge, the purchaser's name, and match the last four digits on the card that purchased it.
- Event Flyer

Reimbursements will be issued to the payee as a check. Payee will be notified when the check is ready for pick up. If being reimbursed for food, tickets, or door prizes you must also include a list of the attendees' names and 700#s.

## Check Requests

If you would like to purchase items using your organization's Hofstra account and it is *less* than \$500.

### Submit to Administrative Advisor

- [Cover Sheet](#)
- [Check Request Form \(example\)](#)
- Itemized invoice (must be clearly labeled INVOICE)
- Flyer or description of event
- W9 (A W9 is need for new vendors or if you are making a donation)

**DEADLINE:** Minimum four weeks before the payment is due.

The individual who submitted the check request will be notified when the check is ready for pick up. If being reimbursed for food or tickets you must also include a list of anticipated attendees' names and 700#s.

## Purchase Orders

If you would like to purchase items using your organization's Hofstra account and it is *more* than \$500

### Submit to Administrative Advisor

- [Cover Sheet](#)
- [Purchase Requisition Form \(example\)](#)
- [Check Request Form \(example\)](#)
- Itemized invoice (must be clearly labeled INVOICE)

**DEADLINE:** Minimum two weeks before the payment is due.

Vendors may be required to provide additional paperwork such as a W-9 or artwork proofs.

If the total is over \$5,000 you will need to attach three bids. Inquiry with your Administrative Advisor for more information.

# Bookstore Purchases

To purchase items from the bookstore using your organization's Hofstra account you will need to utilize a modified purchase order process.

## Submit to Administrative Advisor

- [Cover Sheet](#)
- An itemized list of the items you would like to purchase
- [A Purchase Requisition Form \(example\)](#)
- A list of attendees/participants/recipients (names and 700#s)

After your Purchase Requisition has been approved by your Administrative Advisor you will be given two copies to the Bookstore. Pick out all of the approved items and bring them to the cashier. Provide them with one of the copies of your Purchase Requisition. The cashier will give you a receipt. The receipt needs to be taped to a 8.5"x11" sheet of paper, attached to your copy of the Purchase Requisition and returned to your Administrative Advisor.

# Collecting Money on Campus

Before collecting money on campus please review the [Undergraduate Student Organization Fundraising Guidelines](#). After reviewing the guidelines you will need to submit a Money Drop Form which is located on the front page of [Get Involved HU](#). If any questions or changes regarding your event please email [OSLEvents@hofstra.edu](mailto:OSLEvents@hofstra.edu).

# Raffles

Before deciding on a raffle please review the [Student's Guide to Raffles](#). A door prize or a chance to win a prize just for attending an event is not considered a raffle and does not need to be approved prior to the event.

## Submit to Administrative Advisor

- [Cover Sheet](#)
- [University Raffle Policy](#)
- [University Raffle Registration Form](#)

Please review the [Raffle Ticket Design Guide](#) when creating your raffle tickets.

**DEADLINE: Minimum four weeks before the event.**

# Food

## Campus Catering

All on campus events are required to use Campus Catering for their event needs. To place an order visit Room 128 in the Mack Student Center.

### Submit to Administrative Advisor

- [Cover Sheet](#)
- Catering Invoice\*
- Reason for Event (flyer, announcement, etc)

**DEADLINE: Minimum one week before the event**

\*If paying with SGA Voucher attach completed SGA Voucher with Compass signature

## Outside Food Vendors

Campus Catering must be given the opportunity to provide services. If they are unable to provide service then you may *request* to use an off-campus vendor.

### Submit to Administrative Advisor

- [Cover Sheet](#)
- [Food Policy Approval Form For Food Related Activity or Purchase](#)
- Vendor's Current Insurance Certificate
- Vendor's Valid Nassau County Health Certificate
- Vendor's Menu
- [W-9](#)
- Invoice or Receipt
- Reason for Event (flyer, announcement, etc)
- [Check Request](#)
- List of Attendees

**DEADLINE: Minimum two weeks before the event**

## Meetings with LESS than 10 People

If you are having a meeting or event with less than 10 people you may supply outside food and snacks with advisor and SGA approval. To be reimbursed please see the [Making Purchases](#) section.

# Hofstra Contracts, Speakers, and Performers

Hofstra has many different contracts depending on your event needs. Listed below are a few of the most commonly used contracts. Please meet with your Administrative Advisor to make sure you are utilizing the correct contract before moving forward with your event.

## Submit to Administrative Advisor

- [Cover Sheet](#)
- [Contract Approval Form](#)\*
- [Contract Information Form](#)\*\*
- Appropriate Contract from the list below\*\*\*

**DEADLINE: Minimum four weeks before the event**

For a Musician, please use the [Musician/Accompanist Single Engagement Contract](#)

For a PAID Guest Lecturer, please use the [Guest Lecturer Contract](#)

For a VOLUNTEER Guest Lecturer, please use the [Guest Lecturer Volunteer Form](#)

For a PAID Non-Resident Guest Lecturer, please use the [Non-Resident Guest Lecturer Form](#)

For an all other one time events, please use the [Single Engagement Contract](#)

\* These forms are to submitted to your Administrative Advisor who will then submit the contract on your behalf.

\*\* Only your Administrative Advisor may sign a contract. "University Originator", "Administrator Responsible", "Signature of University Official" are all you Administrative Advisor.

\*\*\* Vendors may be required to provide additional paperwork such as insurance coverage, a W-9, invoice, or other speciality contracts.

***The University no longer administers deposits. If this will be an issue for your event please reach out to your Administrative Advisor ASAP.***

## **Renting Equipment From Off-Campus Vendors**

### Submit to Administrative Advisor

- [Cover Sheet](#)
- [Contract Approval Form](#)
- [Contract Information Form](#)
- [Equipment Rental Agreement](#)

**DEADLINE: Minimum two weeks before the event**

# Photographers & Videographers

## University Relations

The Office of University Relations can provide digital photography by scheduling a University Photographer, a student photographer, or a freelance photographer to be at your event.

### Submit Online to University Relations

- [University Relations Photography Request Form](#)

**DEADLINE:** Minimum three weeks before the event

### Submit to Administrative Advisor

- [Cover Sheet](#)
- Invoice

## Outside Vendor

If University Relations is unable to cover your event you can request an outside photographer or videographer. With approval from your advisor please submit the following forms

### Submit to Administrative Advisor

- [Cover Sheet](#)
- [Contract Approval Form](#)
- [Contract Information Form](#)
- [Single Engagement Contract for Photographers/Videographers](#)
- [Single Use Location Agreement for Filming](#) (if needed)

**DEADLINE:** Minimum four weeks before the event

# Apparel & Promotional Items

Before ordering apparel or other promotional material you must receive approval.

Email to Administrative Advisor (Non-FSL Orgs)

- Artwork Proof

Submit to Administrative Advisor (FSL)

- [FSL Apparel and/or University Branding Form](#)
  - Form will ask for an artwork proof

**DEADLINE: Minimum 10 days before the date you would like place the order**

# Advertising

Student Clubs and Organizations may use several resources to advertise for their events. Please take a look at the [University Policy](#) regarding advertising before you publicize your event.

## Atrium Banners

Recognized student clubs or organizations may reserve a banner space in the Mack Student Center. To reserve a banner space, students should visit the Office of Student Leadership and Engagement in the Mack Student Center, room 244.

### Reserving Banner Space

- A student club or organization may reserve a banner space for up to 14 consecutive calendar days. After a five day break, a club or organization may submit a new banner request.
- All banners (posted for the allotted time) will be discarded on Monday mornings at 9:00 am if they were not removed prior to 9:00 am.

### Banner Guidelines

- Banner paper is available in the Office of Student Leadership and Engagement free of charge.
- The banner paper is flame-retardant; it is the only paper that is approved for the atrium.
- Banners can be 4ft to 6ft long. Please check to make sure your spot is allocated for 4ft or 6ft before designing your banner.
- All banners must adhere to the OSLE flyer policies in addition to all applicable University policies as outlined in the Guide to Pride, Living Factor, Faculty Policy Series, and elsewhere.

## Flyers/Posters

All print materials must be approved by your Administrative Advisor before being utilized.

### Submit to Administrative Advisor

- [Flyer Approval Form](#)
- Copy of Artwork

OSLE will make black and white copies for your organization. If you would color copies please see your Administrative Advisor. Color copies will be an additional charge.

## HOFcast

The HOFcast monitors display information about events that are occurring all over campus. Any registered organization can submit a request for a message to be displayed on HOFcast. HOFcasts are subject to all flyer policy rules regarding content. Please review the [HOFcast Guidelines](#) before submitting any materials.

### Email to Administrative Advisor

- 1920 x 1080 pixel image

**DEADLINE: Minimum 1 weeks before the date you would like it to be displayed**

## **This Week At Hofstra**

This Week at Hofstra goes out once a week to all undergraduate students and graduate students who opt-in.. Feel free to submit all of your events for the semester at once and we will store it to be sent out during the corresponding weeks.

Submit Online

☐ [This Week at Hofstra Submission Form](#)

**DEADLINE:** for submission is Wednesday by 12pm on the week you'd like it to go out

## **University Calendar**

To request that your event be added to the University Calendar please submit the [University Calendar Submission Form](#). If you submit through the form please inform your Administrative Advisor.