Successful Student Organizations 101

Mercer University Fall 2015

Campus Life and Student Involvement
Student Organization Officers and Advisors:

The Campus Life and Student Involvement Office is excited to provide you with this manual which outlines everything an organization needs to be successful from beginning a new organization to working with your advisor. The information contained herein will also be valuable to other officers/members of your organization, especially to those that will be: requesting funding through the Bear Grant process, reserving venues on campus, requesting food for an on campus event or talking to agents about performers or speakers.

We would like to extend our appreciation for your advisor’s willingness to serve as a faculty /staff advisor to your student organization. This role is crucial to the success and continuity of the organization.

Campus Life strives to complement the academic mission of the University by enhancing the out-of-class learning environment. To fulfill this goal, Mercer provides many opportunities to involve students actively in co-curricular activities. By participating in a student organization, attending a QuadWorks or WAM event, joining the Mercer Maniacs Spirit organization, helping with a community service project, or joining an intramural team, a student can have fun and meet other students, faculty, and staff. Additionally, these involvements can help develop leadership abilities, decision-making and organizational skills. There are approximately one hundred and thirty student organizations at Mercer including Greek organizations and club sports. Collectively they reflect the social, recreational, educational, political, and religious interests of Mercer’s diverse student body. Please see the list of current student organizations available on the website at http://studentaffairs.mercer.edu/campuslife/org_list.cfm

The following pages contain:

1. Starting a new student organization
2. Yearly Renewal and Active Status of an existing Student Organization
3. Understanding the Bear Grant Process and Co-sponsorship Opportunities
4. People to Know on Campus
5. Advisor roles and responsibilities
6. Campus Reservations/Event Approval Guide
7. Set-Ups and Physical Plant for On Campus Events
8. Providing food for on-campus events
9. How to plan an event
10. Campus Posting Policies
11. Important campus policies for student organizations
12. Greek Life policies
13. Tax Exemption Process
14. Travel Policy and forms

NOTEBOOK APPENDIX: Catering guide, reservations sample sheet, blank W-9, generic contract, sample constitution and by-laws, travel documents (Email campuslife@mercer.edu for electronic version)

Most importantly, remember that every Fall semester (and spring if you have officer changes then) must complete the online renewal form (part of the co-curricular transcript) to be considered an active organization. If you are inactive you will not be able to reserve on campus spaces or post advertisements for events so please be sure to fill it out. If you remain inactive for more than two semesters, you will have to re-apply to become a student organization with Campus Life and SGA.

Information is listed in section 2.

The Campus Life office is a resource for you and your student organization. Please contact us at any time with your questions or concerns. We hope that you find this handbook useful and informative.

Sincerely,

Carrie Ingoldsby
Director of Campus Life
1. Starting a New Student Organization
To become a recognized student organization on the Mercer University campus, the petitioning student group must review which category (3 available) of desired status s/he would like and complete the following information to the Office of Campus Life:

a. Club Sports
Complete the guidelines provided by Recreational Sports & Wellness.
   1. Submit application with Recreational Sports & Wellness.
   2. Determine if your organization will be Recreational or Competitive.
   3. Get an Advisor (required) and Coach (optional).
   4. Submit a budget estimate to get started.
   5. Roster of enrolled students (include name and SS#).
   6. Promotional Flier to advertise interest.

b. Religious Affiliated Student Organization
Follow the guidelines set forth by the Religious Life Center (see campus life website)
   1. Application for University approval.
   2. Confirmation of logistics.
   3. Affirmation of the Covenant of Respect and Responsibility
Also submit constitution, bylaws and all officer/advisor information to Campus Life once officially recognized.

c. General Student Organization

   1. Submit the signature page listed on the website to Campus Life.
   2. Submit Constitution and Bylaws to Campus Life. You will need the following information:
      a. Name of student organization
      b. Classification of Organization (Media, Arts, Service, Special Interest, Recreation, Programming, Governance, Multicultural, Social Greek, Religious)
      c. Purpose statement
      d. Officer structure
      e. Ratification Date (current year of the constitution in place)
   3. Submit a list of interested members (must have 7 to be recognized)

**Refer to the constitution template on the website if you do not have one for your particular organization. This is only an example. If you have a constitution and/or bylaws, you do not need to fill this out.

   4. Meet with a Campus Life representative. Call the office at (478) 301-2868 or email us at campuslife@mercer.edu to schedule an appointment. Bring all forms and paperwork so we have a copy on file for your organization.
   5. Meet with a representative of SGA to go over process for formal approval. Get formal approval from the Student Government Association (SGA).
      a. Student organizations MUST be recognized by SGA to operate on campus. (exceptions include departmental orgs such as honor societies, Greek orgs, religious orgs and club sports)
b. Student organizations will not be recognized if not open to all current Mercer students. This includes general membership and officers.
c. Student organizations must be recognized by SGA regardless of funding needs.

6. Once approved, submit all officer information online under student organizations, then click “renew/register your organization” on the Campus Life website.
7. Notify Campus Life that your organization was approved/denied during SGA proceedings within 24 hours of the meeting.

All elements of this process must be completed before Mercer University will recognize you as a student organization. Once recognized, be sure to follow the renewal procedures each year and attend required workshops and meetings to be considered active on a yearly basis.

2. Student Organization Renewal Requirements
In order to maintain recognized status, each student organization is required to submit the following information to the Office of Campus Life each fall via the online renewal form. (Submit in spring if/when information changes)
Student Organizations: Please fill out the online renewal/registration form at http://studentaffairs.mercer.edu/campuslife/studentorgs.cfm. Click under Renew your Student Organization and submit all information. If you have questions please contact the Office of Campus Life at x2868 or email campuslife@mercer.edu. Don’t see your organization info listed on our website? Submit your info via the link and follow up with Campus Life.

***We encourage both club sports, honor societies and religious organizations through the Recreation office, Academic Depts. And Religious Life Center to submit renewal information each fall so we can list your organization as active on our Campus Life website even though you follow different renewal procedures.

a. Club Sports

- Complete the guidelines provided by Recreational Sports & Wellness. See the Director of Campus Recreation in the University Center for more information.
- Submit all renewal information including officers and advisors to Campus Life each semester via the online link. If available, also submit the most up to date constitution and bylaws for the club to the office of Campus Life.

b. Religious Affiliated Student Organization

- Follow the guidelines set forth by the Religious Life Center
- Submit the most up to date Constitution, Bylaws and contact info to the Office of Campus Life.
  - If the Constitution and Bylaws have not changed since last year, please provide only the top page with the ratified date.
- Submit all renewal information including officer and advisor changes via the website renewal form http://studentaffairs.mercer.edu/campuslife/studentorgs.cfm. Click under the Renew you Student Organization and submit all information.
c. General Student Organization

- Provide Updated Advisor’s and Presidents signature Page
  - You can retrieve the Signature Page under Campus Life webpage at http://studentaffairs.mercer.edu/campuslife/neworg.cfm.
- Submit the most up to date Constitution and Bylaws to the Office of Campus Life.
  - If Constitution and Bylaws has not changed since last year, please provide only the top page with the ratified date.
  - If it has: Submit Constitution and Bylaws to Campus Life. You will need the following information:
    a. Name of student organization
    b. Classification of Organization (Media, Arts, Service, Special Interest, Recreation, Programming, Governance, Multicultural, Social Greek, Religious)
    c. Purpose statement
    d. Officer structure
    e. Ratification Date (current year of the constitution in place)
- Submit all renewal information including officer and advisor changes via the website renewal form at http://studentaffairs.mercer.edu/campuslife/studentorgs.cfm. Click under the Renew your Student Organization and submit all information.

3. Understanding the Bear Grant Process

Bear Grant Information

*Informational meetings:* Will be set each fall and advertised to all orgs. (Mid Sept.)

*Application Due:* Typically within one week after Info Meeting

**Requirements for receiving funding from SGA through the Bear Grants Process**

1. Your organization is approved and recognized by Campus Life and SGA.
2. You have filled out all required updated documentation including the online renewal form and have submitted updated/changed constitutions.
3. Prepared a budget for the fiscal year; including a desired budget and a minimum budget.
4. Attend the informational meetings set by the Fiscal Affairs Committee to receive specific information regarding SGA’s funding.
5. Complete the Bear Grant application on the SGA website listed below.
   a. Include important information
      i. Contact Information (President and Treasurer)
      ii. As many DETAILS as possible about each line item in your request
      iii. Accurate calculation on funding requests
   b. Sign up for a Bear Grant Hearing Time
      i. Dates and Times will be announced early in the Fall
   c. Come prepared to your hearing
      i. President and/or Treasure MUST be present
      ii. One other representative may attend as well
Basic information about the Bear Grants process

1. The Fiscal Affairs committee will discuss and determine the funding they deem reasonable for each organization.
2. The committee chair will notify you of any changes made to your request after your hearing.
3. The Fiscal Affairs committee will sponsor a Bear Grants request legislation in our weekly meeting to seek approval from the Senate. If you plan to appeal any decision the Fiscal Affairs committee has made in regards to your Bear Grant, please notify the Fiscal Affairs chair.
4. After we vote, we will notify you through the e-mail about how to receive your check. Checks are available two to three weeks later.
5. An organization may also apply for Special Funding and/or Conference & Lodging Funding after the Bear Grants process has already occurred.

Go to sga.mercer.edu to apply for Bear Grants online.
ALL EMAILS REGARDING SGA’S FUNDING SHALL BE SENT TO:
FiscalAffairs@gmail.com

Co-sponsorship Opportunities on Campus

1. SGA
Organizations seeking funding for an event have the opportunity to apply for special funding through SGA. All interested organizations may email the Student Life and Organizational Affairs Committee of SGA at sloamercer@gmail.com for more information. The application process will occur each fall and be awarded to a minimum of one event per year.

2. QuadWorks
Organizations that are planning on campus events for the entire student body have the opportunity to apply for funding through the campus programming board, QuadWorks. The level of financial support will be determined by the members of QuadWorks. Organizations may be asked to present the event idea to the board before receiving funding.
In addition to funding, Quadworks can assist with event planning and advertising. It is important to include in the application the specific requests of the organization. If an organization receives financial support, they must provide documentation (invoices and receipts) to the Treasurer of Quadworks.
**QuadWorks does not provide financial support to organizations planning a fundraiser.
For more information about how to co-sponsor an event with QuadWorks, please email quadworks@mercer.edu or stop by the Campus Life office-3rd floor CSC.

3. Campus Life
Are you thinking of an all campus event for students on a Friday or Saturday evening? Need additional funding to make it happen? Stop by Campus Life or email campuslife@mercer.edu to find out how to co-sponsor a WAM (Weekends at Mercer) event. Student surveys at Mercer show more and more students want to attend campus events on the weekend and stay on campus over the weekend. Campus Life can help you create an awesome event with advertising, financial support and planning help. WAM
events are scheduled several months in advance so early planning is key to secure this type of funding!

4. Center for Community Engagement
Interested in a service project in Macon or surrounding community? Would you like to get more students at your service event or receive financial help to advertise and put on a service project? Stop by the Center for Community Engagement (Lobby of the CSC) to discuss co-sponsorship opportunities. Check out Service Saturdays all year long! Sign your organization up to help out on a Saturday in Macon-Part of the Local Engagement Against Poverty initiative. For more information you can also call the Community Engagement Office at 478-301-2870 or email Hannah Vann at vann_hf@mercer.edu

4. People to Know on Campus

People to Know on Campus
(You can do it; they can help)

<table>
<thead>
<tr>
<th>Name and Contact Info</th>
<th>How They Can Assist You</th>
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<tbody>
<tr>
<td><strong>Dr. Steve Brown</strong></td>
<td>Associate Dean of Students</td>
</tr>
<tr>
<td>(478) 301-2863</td>
<td>Questions or concerns about Career Services, CAPS, Disability Services, and Student Health</td>
</tr>
<tr>
<td><a href="mailto:brown_sr@mercer.edu">brown_sr@mercer.edu</a></td>
<td></td>
</tr>
<tr>
<td><strong>Ricky Clark</strong></td>
<td>Assistant Director for Residence Life</td>
</tr>
<tr>
<td>(478) 301-5118</td>
<td>Questions or concerns regarding residential living and programming</td>
</tr>
<tr>
<td><a href="mailto:Clark_rd@mercer.edu">Clark_rd@mercer.edu</a></td>
<td></td>
</tr>
<tr>
<td><strong>Michelle Currie</strong></td>
<td>Director of TRIO Programs &amp; Student Support Services</td>
</tr>
<tr>
<td>(478) 301-2686</td>
<td>Coordinates Upward Bound, Opportunity Scholars and Minority Mentors</td>
</tr>
<tr>
<td><a href="mailto:Currie_m@mercer.edu">Currie_m@mercer.edu</a></td>
<td></td>
</tr>
<tr>
<td><strong>Cindy Drury</strong></td>
<td>Associate Director of Campus Life</td>
</tr>
<tr>
<td>(478) 301-2868</td>
<td>Questions or concerns involving Campus programming, Panhellenic Council/Greek Life, QuadWorks, etc.) and opportunities for collaboration</td>
</tr>
<tr>
<td><a href="mailto:drury_cf@mercer.edu">drury_cf@mercer.edu</a></td>
<td></td>
</tr>
<tr>
<td><strong>Adam Falk</strong></td>
<td>Area Coordinator, Residence Life</td>
</tr>
<tr>
<td>(478) 301-2056</td>
<td>Questions about residential living at Mercer</td>
</tr>
<tr>
<td><a href="mailto:Falk_ac@mercer.edu">Falk_ac@mercer.edu</a></td>
<td></td>
</tr>
<tr>
<td><strong>Hannah Vann</strong></td>
<td>Coordinator for Community Engagement</td>
</tr>
<tr>
<td>(478) 301-2870</td>
<td>Assist with all volunteerism questions and efforts. Coordinates MerServe and work study tutors.</td>
</tr>
<tr>
<td><a href="mailto:Vann_hf@mercer.edu">Vann_hf@mercer.edu</a></td>
<td></td>
</tr>
<tr>
<td><strong>VACANT</strong></td>
<td>Assistant Director for Greek Life</td>
</tr>
<tr>
<td>(478) 301-2868</td>
<td>Assistance with Greek Life questions and concerns; assistance with contacting the Greek Chapter Presidents, etc.</td>
</tr>
<tr>
<td><strong>Carrie Ingoldsby</strong></td>
<td>Director of Campus Life and Student Involvement</td>
</tr>
<tr>
<td>(478) 301-2868</td>
<td>Questions or concerns about Campus Life, Greek Life; Leadership, Volunteerism, student organizations. Assistance with events and programs and opportunities to collaborate.</td>
</tr>
<tr>
<td><a href="mailto:Ingoldsby_cf@mercer.edu">Ingoldsby_cf@mercer.edu</a></td>
<td></td>
</tr>
<tr>
<td><strong>Michele Josey</strong></td>
<td>Student Affairs Office Coordinator</td>
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Assistance with marketing your organizations’ events through weekly Bear Blurbs emails. Submissions must be received by 8 a.m. on Monday morning and must include all the basics (Who, What, When, Where, Why, How) to ensure inclusion.

Michael Junod
(478) 301-5153
Junod_m@mercer.edu

Director of the University Center
Assistance with scheduling the use of UC rooms/areas for programs, events, etc. (Campus Reservations still required)

Lizzie Martin
(478) 301-2687

Area Coordinator, Residence Life
Questions or concerns regarding Social Justice programming, Greek life housing and Residence Life questions

Samantha Murfree
(478) 301-2685
Murfree_SW@Mercer.edu

Associate Dean of Students
Questions or concerns about Campus Life, Recreational Sports and Wellness, Leadership, and the Judicial process

Evan Paulson
(478) 301-4200
Paulson_er@mercer.edu
www.mercer.edu/reservations

Coordinator of Campus Resources
Assistance with campus room and/or space reservations (including CSC lobby tables) as well as resource reservations (A/V equipment, tables, chairs, set-ups, etc.)

Dr. Doug Pearson
(478) 301-2685
pearson_dr@mercer.edu

Vice President and Dean of Students
Questions or concerns regarding Student Affairs functional areas (including offices/departments as well as SGA)

Dr. Emily Piassick
(478) 301-2862
piassick_ea@mercer.edu

Director of Counseling and Psychological Services
Questions or concerns regarding CAPS as well as a resource for topics including relieving stress, body image issues, etc. Chair of the SHAPE Committee

Aaron Probst
(478) 301-2925
probst-aaron@aramark.com

Director of Mercer Food Services
Information regarding catering events, both on or off campus (everything from Chick fil A to Filet Mignon) as well as using the FFC to help market your events

Melinda Robinson
(478) 301-2864
Robinson_md@mercer.edu

Assistant Director of Career Services
Questions about Career Services

Frantz Salomon
(478) 301-2784
Salomon_f@mercer.edu

Area Coordinator for Residence Life
Questions or concerns regarding residential living and programming

Kyle Sears
(478) 301-4037
Sears_k@mercer.edu

Director of Media Relations
If you would like media coverage of your next event, Mark can help with press releases, etc. Be sure to let him know what you’re planning in advance, and keep him updated!

John Steele
(478) 301-2900
steele_jt@mercer.edu

Campus Services Coordinator
Event set-up guru – whether you need one table, a circus tent, or 12 inflatables, John will be able to help. Get in touch with him before you book equipment, etc. He’ll probably be able to save you money!

Caroline Terry
(478) 301-2687

Area Coordinator for Residence Life
Questions or concerns regarding residential living and programming
<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Todd Thomas</td>
<td>Director of Recreational Sports and Wellness</td>
<td>(478) 301-2404, <a href="mailto:Thomas_ta@mercer.edu">Thomas_ta@mercer.edu</a></td>
</tr>
<tr>
<td>David Toliver</td>
<td>Audio/Visual Support Specialist</td>
<td>(478) 301-2942, <a href="mailto:Toliver_tt@mercer.edu">Toliver_tt@mercer.edu</a></td>
</tr>
<tr>
<td>Christian Wells</td>
<td>Assistant Director for Residence Life</td>
<td>(478) 301-2693, <a href="mailto:wells_c@mercer.edu">wells_c@mercer.edu</a></td>
</tr>
<tr>
<td>Michael Castaneda</td>
<td>Assistant Director of Recreational Sports and Wellness</td>
<td>(478) 301-2370, @mercer.edu</td>
</tr>
</tbody>
</table>

**5. Advisor Roles and Responsibilities**

Thank you for the time and effort that you give to ensure the effectiveness of our campus organizations and the growth and development of our student members! We know your role can be very demanding, and at times confusing, so we hope that the following information is helpful to you.

Whether you are a new advisor or an established advisor working with a new group of officers, we recommend that you first take the time to meet with your officers to discuss mutual expectations regarding task responsibility, involvement in decision-making, and attendance at meetings and programs. This initial discussion will help to alleviate confusion and conflict, and will hopefully get your relationship off to a good start!

**General Responsibilities of Advisors:**

**An effective advisor:**

1. is a knowledgeable resource,
2. shares valuable input into policy and program development,
3. interprets university policies and regulations,
4. provides continuity, and
5. is a good role model for students.

**Guidelines for effective advising include:**

1. helping the group develop goals and plans of action,
2. knowing the group and its unique needs,
3. being available and approachable,
4. providing appropriate feedback, and
5. sharing in the group's experiences!

In summary, advisors serve as consultants and educators to the organizations and students they advise.

**Functions of Advisors**

1. **Maintenance functions** include those activities that help the group exist, such as interpreting policies, sharing information about resources, and serving as the validation signature when necessary.
2. **Group growth functions** are designed to help the group become more effective in progressing towards its goals through leadership development opportunities.
3. **Program content functions** include those behaviors which help the group achieve higher levels of self-actualization through pointing out new perspectives and providing ideas for new programs.

**Tasks for Advisors**
The 5 tasks for the initial development of an organization or the re-evaluation of a student group include:

1. determining the need for the organization,
2. identifying support,
3. obtaining a source of income,
4. ensuring effective student leadership, and
5. developing methods of system maintenance.

Contact the Office of Campus Life for any questions: (478) 301-2868 or campuslife@mercer.edu.

6. **Campus Reservations/Event Approval Guide**

**Mercer Event Approval Guidelines**
*For Macon Campus Student Organization Events*

- All Student Organizations must have on campus events approved by the sponsoring office or department (Campus Life, Club Sports, Religious Life).

- On campus events include any event scheduled outside of regular or weekly organization meetings that are advertised to the student body or public.

- Event Approval is connected to the on campus reservation form. Students will submit the reservation form with all fields completed. This form will serve as the official event approval form for all student organizations. No additional forms are needed.

- **RESERVATION REQUESTS MUST BE SUBMITTED NO LATER THAN 10 DAYS BEFORE EVENT.**

- Once a reservation/event approval request is submitted, all information will be filtered to the appropriate office/department for approval.
Once approved by that office/department, the event request will be automatically submitted to the reservations office. Student organizations will not need to re-submit or do anything other than the initial reservation using the online form.

Student organizations will be notified if an event has not been approved by the sponsoring office/department and will consult with that office to discuss the event further and make necessary changes or cancellations.

If an event is approved and submitted to the reservations office and there are specific venue conflicts, the reservations office will be in contact with the requesting student organization to make all necessary changes or cancellations.

**PLEASE REFER TO THE FOLLOWING RESERVATION GUIDELINES/INFORMATION FOR ALL ON CAMPUS EVENTS:**

**CAMPUS RESERVATIONS**
Mercer's Macon campus has 1300 Faculty and Staff members and close to 3000 students to be considered when reserving space. Our office receives approximately 40 requests for reservations each day, and we work to accommodate everyone. Advanced planning is essential when working with a large number of requests and a limited number of venues.

Make your requests through the procedures outlined on our website - as organizations and individuals that follow these procedures are given first priority.

If you have any questions regarding the procedures that have been put in place to manage the process of reserving space, feel free to contact the reservations office to discuss.
(478) 301-4200  http://www.mercer.edu/reservations/

**IMPORTANT GUIDELINES**

- Refer to the University Calendar and the Web Viewer to check for conflicting events.
  
  University Calendar:  http://apps.mercer.edu/calendar/
  Reservations Web Viewer:  http://www.mercer.edu/reservations/

- Go to the reservations website shown above and complete the form providing as much detail about your event as possible.

- Confirm your date and venue before you promote your event. A reservation request does not guarantee use of a facility. When a space has been confirmed or denied, an e-mail will be sent to you.

- Requests must be received a minimum of 10 working days prior to the event. Please send two weeks before the event to allow for Event Approval by the appropriate office

- If you need to cancel your event or make any changes to the set-up, attendance, etc. please do so 3 working days in advance.
In some venues the set-up cannot be changed or is limited which will affect the number of people each space will accommodate.

**Envision each space (except classrooms) as empty and request all resources needed for your event.**

Media resources require approval and may delay your confirmation. Include all needs in your reservation request. To confirm before your event you may also contact David Toliver-AV Specialist. toliver_dd@mercer.edu or Extension2942

Equipment may be reserved during the week Monday-Thursday 8am-10pm if event starts and ends within that time; Friday 8-5pm

Equipment outside of those times must be checked out from the library and depends on availability

If you cancel your event, YOU MUST cancel your equipment by cancelling the ENTIRE reservation through the reservations office. This frees up the room and the equipment for use by other organizations.

If your event needs **catering** and/or if you need **tablecloths and skirting** for your non-catered event you must contact **Aramark** (478) 301-2925.

Notify Mercer Police at least one week in advance by email if you need them to work an event on or off campus: mercerpolice@mercer.edu (Rates are subject to change, address costs within the email). Must have two officers present for a minimum of three hours.

My goal is to work with you to make your event as successful as possible! We have great venues on the Mercer University campus for meetings and events. I look forward to working with you and hope you have a great year at Mercer.

Evan Paulson
Coordinator of Campus Reservations and Development Support
Mercer University Advancement
478.301.2189 - Phone
478.301.4200 – Reservations
478.301.4124 – Fax

[www.mercer.edu/reservations](http://www.mercer.edu/reservations)
7. Set-Up and Physical Plant for On Campus Events

**Event Set-Up-Physical Plant**

1. Get your request for events in at least 2 weeks in advance to the R25 Specialist Evan Paulson at ext. 2189 or on the Mercer website. (10 business days)
2. If you do not have a confirmation, you do not have a reservation. It is first come first served. So get it in early.
3. Please notify John Steele ext.2508 or Michelle Beavers ext.2902 at the Physical Plant of any vendors coming on campus at least 48 hours in advance.
4. Be sure to get information from any vendors you are using, such as, power or water needs.
5. Make sure to reserve all the equipment you will need for your event, i.e. chairs, tables, podium, trashcans, media needs, ect. (don’t forget tables for catering!)
6. Contact Nationals one week in advance to verify that enough trashcans will be available for your event. OT hours apply if outside of the regular working hours for events. (478) 301-2781
7. Make sure to contact Aramark for their needs to add to your reservation. This is your responsibility.
8. Do not use rooms or resources without a reservation. Do not remove equipment from the buildings.
9. Be sure to cover all of the tables you use for your events, either through Aramark or through your organization.
10. Please take care of the equipment, so that we can continue to provide you with what you need for your events.
11. No vehicles are to be driven on campus without authorization. At NO time should there be a vehicle on the grass.
12. Do not stick anything in the ground without contacting the Physical Plant first.
13. If you put tape (no duct tape please) or anything on the equipment it is your responsibility to remove it.
14. No tape on buildings-walls or windows please!
8. Providing Food for On-Campus Events

***Student organizations and departments that are planning to have any type of catering for an event on campus are required to consult with Aramark before bringing any food on to campus by another vendor. This is part of the contract with Mercer and Aramark and should be followed at all times. Aramark’s manager must give approval to use an outside vendor in any location on campus including the RLC, UC and CSC. Aramark will work with all student organizations with set budgets for catering.

**Classic Fare Catering @ Mercer University – Event Planning List:**

1. Determine the date, time, and type of event desired.

2. Check availability of desired location and reserve the room with Evan Paulson at 478-301-4200. Verify seating capacity and restrictions if any.

3. Decide on a budget for food. (The Catering Staff will be able to help you with menu choices to fit your budget)

4. Our Catering Guide can be found online at: [www.mercerdining.com](http://www.mercerdining.com). If you are unable to find what you would like, we will be happy to recommend or create something for you.

5. Call Mercer Catering at 478-301-2927 or email: Catering@mercer.edu, to plan the event.

6. Decide on table arrangement, including the number of guests at a head table and a room diagram.

7. Request additional tables for gifts, awards, nametags.

8. Decide on the number of "Reserved" tables and request signs.

9. Remember to include entertainers in your guest count if you plan to feed them.

10. Prepare a schedule of programming that will occur during the course of your event. Be sure to give a copy to Mercer Catering as the wait staff will leave the dining area during programs to avoid noise and distraction that may disturb your guests.

11. Notify Mercer Catering of special dietary needs including vegetarian or vegan, religious considerations and allergies.

12. Call Mercer Catering with the final guest count at least 72 business hours before the event.
9. How to plan a successful Event

The Most important three steps to consider BEFORE you plan:
1. Relax. Though the amount of planning may seem daunting, your enthusiasm and your ability to plan ahead will give you confidence and will allow you to enjoy the event you planned.
2. Make notes of your ideas as they come to you. There are too many details to remember them all.
3. Delegate tasks to group members. Don’t try to accomplish everything by yourself!

THE 8 Steps to Follow for Planning:
1. The Six W’s
   - Who is holding the event?
   - What is the main attraction?
   - Why is it happening?
   - Whom is the event for?
   - Where is it happening?
   - When is it happening? The day of the week, the calendar date?
2. Divide the event into categories.
   - Guest List
   - Invitations/Publicity
   - Facilities (room set-up, tables/chairs, audio/video equipment)
   - Decorations
   - Catering
   - Favors/Give-aways
   - Entertainment
   - Transportation
   - Amenities (security, first aid station, rain location, parking)
   - BUDGET!! Make sure someone is keeping track of every dime so you don’t overspend
3. Create a Planning Calendar for each month between now and the event. Make note of date by which projects need to be completed and dates by which all forms must be submitted.
4. Now that you have all the components in mind, begin to devise an Event Budget including the costs of each item.
5. Make an Event Checklist that lists all items that need to be accomplished the day of the event. Include contact information of important people or places in case you need to get a hold of anyone.
6. An Event Program should be used to help make things run as smoothly as possibly on the day of the event. It lists all of the main activities and tells when and under what
conditions each one takes place. In a convocation, for example, the speaker will present at 12:30 only after a member of the organization introduces him and his achievements. The event program can be revised after each verbal “walk-through” to ensure a smooth event.

7. With every event, especially outdoor events, alternatives should be considered in case something unexpected occurs (e.g. bad weather, accidents, no-shows). Don’t forget to make alternative plans for unexpected occurrences.

8. Make a **Goal Statement** that states what you hope the event will accomplish and share it with your team. Writing this goal after you have finished all of the planning allows you to have a more realistic vision for what will take place.

**Be Mindful of the Media**

All non-athletic media inquiries are handled through the Office of University Relations and Marketing. There are several reasons for this procedure.

It is important as an institution that we centralize our message to the media through one office so as to be consistent with our response. Sometimes a story developing in the media requires the collection of input from different offices within the University and then collated into one response. It also allows the University to know of the media’s interest in the University and to find the appropriate individuals to speak on behalf of the Institution.

All media calls and/or inquiries should be directed to Rick Cameron, Assistant Vice President for University Relations and Marketing. Rick Cameron’s office is in Macon and can be reached at (478) 301-5500.

Please do not attempt to answer any questions yourself posed by the media but, rather, direct their calls Rick. Thank you for your cooperation.

**The Budget**

Make sure you take into account the following expenses:
1) The artist’s fee.
2) The booking agent’s fee.
3) Production: sound and lights and rider requirements.
4) Catering.
5) Advertising.
6) Security.
7) Ticket Printing.
8) Your school’s internal expenses.
9) Hall rent.
10) Any other expenses you may incur.
11) Obtain an advance copy of the rider through the agent if you are uncertain about your ability to afford the show.
GO TEAM GO!
How to motivate student volunteers

Sometimes it can be difficult to get volunteers to work an event. There is a lot of work to do, the schedule can be hectic, and the hours are definitely long. The key is to give your volunteers a vested interest in the show. The following are some ideas regarding just this.

1) **Invest your volunteers weeks before the event.** It is essential to get people involved from the beginning. Ask the people who will be working load in and load out to help develop publicity ideas, coordinate ticket sales, and help move out in general. The more involved people are the more they tend to stay motivated. Getting people involved from the ground floor will help insure their dedication throughout the process.

2) **Be realistic about what will be involved as a worker.** Informational meetings with your perspective event staff are valuable for many reasons. The meetings allow you the opportunity to introduce yourself to everyone, to establish department and crew chiefs, and to lay out what is really involved with working an event. In other words, it’s a good time for a reality check. Make sure everyone knows what is involved and is willing to commit to the project. If people just want free tickets, show them the door. You need people who are willing to work.

3) **Investigate incentive programs for your volunteers.** People like to get stuff. Whether its staff shirts or free tickets, when a student gets something for his or her efforts, they feel involved and rewarded. If your budget is limited, you might want to consider approaching local businesses about donating gifts that you can give to the crew. However, make sure you have the commitment before you give away anything.

4) **Enlist the services of organizations on campus.** ROTC, Greek organizations, and other campus groups can be great sources of labor and assistance. Establishing relationships with these groups ahead of time can both help you, not only for the impending event but also for events still to come. Wouldn’t it be nice to know that there would always be a pool of workers from the XYZ organization?

5) **Never underestimate the power of a kind word.** As event planners, your job is to not only put on a first class show but also to make your workers feel appreciated for the time they have put in. Make the effort and time to thank everyone: your efforts will be rewarded.

**10. Campus Posting Policy**

The Office of Campus Life, located on the third floor of the Connell Student Center, serves as the clearinghouse for campus publicity for the student center in order to aid student organizations, campus departments, individual students, or off-campus individuals and groups in advertising their events, services, and items for sale. Please get approval for flyers in all other buildings on campus from the specific departments housed in the buildings.
Due to structural, safety, and aesthetic purposes, fliers and advertisements may only be posted on designated bulletin boards and kiosks. Posters and banners may not be posted on the exterior or interior of any building, with the exception of professionally made vinyl banners attached to railings by rope or twine. The Office of Campus Life must approve banners.

Student organizations, academic and administrative departments, and off-campus individuals or groups may come to the Office of Campus Life, Monday through Friday, 9 a.m. to 5 p.m. to have fliers approved for posting. Once the publicity has been approved, staff in the Office of Campus Life will stamp the flier(s) and will post on bulletin boards and kiosks only at the Connell Student Center (maximum of 7 fliers). Fliers without a dated approval stamp will be removed. (Note: Fliers from academic and administrative departments will be approved automatically, but they must still be stamped.) Space on the CSC bulletin boards and kiosks is limited and is available on a “first-come, first-served” basis. Please allow 48 hours for publicity to be posted. All fliers for events or meetings MUST include the access and accommodation statement to be approved.

To request alternative formats or accessible seating due to a disability, please contact the event organizer at ____________________ at least 7 days prior to the event date.

Fliers may also be posted on the bulletin boards located in the public areas of academic buildings with permission from the academic department staff. To post fliers in the residence halls or apartments, please request permission from the Office of Residence Life. To post fliers in the University Center, please request permission from the Office of Recreational Sports and Wellness. Students may use sidewalk chalk on non-painted concrete surfaces.

All advertisements must also be in good taste and may not include inappropriate language or references to alcoholic beverages and drinking. Advertisements that are deemed in violation of the community of respect will not be approved and may not be placed on campus. Advertisement for Greek social events must indicate that these activities are open to members and guests only in order to be compliant with FIPG, Inc. policy. Failure to follow these policies may result in a suspension of posting privileges.

**Chalking Guidelines**

Student Organizations may only chalk on horizontal surfaces across campus. These surfaces may not be under any roof tops and is only permitted on sidewalks across campus. Please refrain from chalking on top of artwork or statue areas such as the Jesse Mercer Plaza. All chalking shall be at least 15ft away from any building that is owned by Mercer University. “If you can walk it you can chalk it, as long as you can get rained on.” All student organizations will have 24 hours after the event to remove the chalk from the ground.

All chalking must also be in good taste and may not include inappropriate language or references to alcoholic beverages and drinking. Chalking that is deemed in violation of the community of respect will not be approved and may not be placed on campus. Failure to follow these policies may result in a suspension of posting privileges.
Please contact Campus Life at x2868 for more information about the Mercer University posting policy.

11. Important Campus Policies for Student Organizations

a. Dead Week
All recognized student organizations must observe Dead Week and Reading Day. Dead Week begins four days prior to the first day of exams in each academic term. No social activities, recruitment, initiations, or other scheduled activities may occur between the beginning of Dead Week and the conclusion of Final Exams. Reading Day is the day between the last day of classes and the first day of exams. The same policies apply for Reading Day as for Dead Week.

b. Organization Membership Requirements
Membership in most student organizations is subject to the specific requirements of the organization and to provisions as set forth in Title IX of the Federal Code and the University’s Policy of Nondiscrimination: “Mercer University does not discriminate on the basis of age, race, color, national or ethnic origin, sex or handicap in the administration of education policies, admission policies, financial aid, employment of any other University program or activity.”

c. Room Reservation Policy
Recognized student organizations may reserve a room on campus through an on-line form submitted to the Office of Campus Reservations. The Web address is www.mercer.edu/reservations/. Request for a space does not automatically ensure the use of the facility. Rooms and facilities on campus must be reserved at least two weeks prior to the event to ensure that the event runs smoothly.

Each organization or group using Mercer facilities must do so within the General Policies and Regulations of the University. Each facility should be returned to its original condition. Any excessive clean up that is needed will be billed to the user. Failure to use facilities properly will result in possible suspension of privileges.

Please check web viewer on the reservations web page to see what rooms and locations are available before submitting a room reservation. Be sure to provide alternative locations and dates to ensure a reservation.

d. Statement on Auctions/Member Sales
Much discussion has taken place recently on the subject of “date auctions” and “tuck-ins.” Many opinions have been expressed regarding whether these are appropriate activities for student organizations at Mercer. The purpose of this statement is to discuss briefly three aspects of these activities that make them inappropriate in the opinion of the Division of Student Affairs.

Racial Insensitivity: Date auctions tend to have the appearance and “trappings” of slave auctions. Slave auctions were a very real and tragic part of the history of this country. They devalued the dignity of human beings to the level of merchandise. Regardless of the intent of a date auction, it still involves one person “bidding” for the services of another person. An auction of this type consists of one person paying a second person (or
organization) for the services (work, time, etc.) of a third person. The bidding process invariably involves a comparison of the relative “value” of each person being auctioned. On a campus where equality, openness, and sensitivity are valued, any activity that suggests the auctioning of one human being’s services to another is inappropriate.

**Gender Insensitivity:** An extension of the issues above is the need for us all to respect the rights of others and to know that a person cannot be bought. One of the dangerous attitudes that continue to exist between men and women is that whoever pays is entitled to the “services” of the other. This sense of entitlement is one factor in the prevalence of date rape on college campuses. Date auctions and tuck-ins can tend to create an environment where those expectations may be used to the disadvantage of one or the other participants.

**Personal Safety:** Date auctions and tuck-ins often involve a “well-known” person spending time on a “date” or “tuck-in” with a stranger whom he or she otherwise might not have chosen to socialize. The organization sponsoring the auction has no way of knowing the motives of the people doing the bidding. A “fatal attraction” circumstance is possible, where the date auction/tuck-in becomes a very convenient means by which a person has the opportunity to “buy” some time with the person to whom he or she is attracted. Although the possibility of this scenario may seem extremely remote, it has considerable liability implications for the organization sponsoring the event.

Given the above concerns, which expose the potential for persons and/or groups either to be offended or hurt, date auctions and tuck-ins may be interpreted as an ill-conceived way to raise money. If an organization wants to hold an auction, Mercer encourages the auctioning of items, such as tickets to an event or dinners at a particular restaurant, rather than auctioning of individuals. If an organization is planning to hold any form of a date auction or tuck-in, that group MUST see the Director of Campus Life to discuss all details of the event and for final approval. The Office of Campus Life has the authority to deny this type of event at any time.

**e. Sword/ Saber Polices**
Weapons will continue to be restricted from campus. However, Greek organizations who utilize these items as part of their formal ritual will be permitted to obtain approval for an exception to this rule with the following stipulations:

1. The group must submit in writing, in advance, to the Office of Campus Life a request for permission to have a display item at formal events. This request must be supported by documentation from your national headquarters that verifies that the item is an essential element for the event. I do not need to know the reasons or history behind the item, but I do need to know the type and frequency of the events in which the item would be present on campus during the year. (This request would only have to be submitted once for each organization- not annually).
2. The group must notify the Office of Campus Life in writing each semester the specific dates and times in which the item would be on campus. This schedule could be updated at any point during the semester prior to the event. The item can not be on campus more than one hour before or after the approved event. The item must be stored at either an off campus facility, or at the Mercer Police
Department, between events. Items stored in a campus fraternity house, a student room, or in a car on campus will be in violation of this policy.

f. Travel Policy
Student Organization Policy
Student organizations are encouraged to participate in regional and national tournaments, conferences and events as appropriate for their specific interest group. Although approved student activity fees may be used to fund such trips, these trips are organized and the sole financial responsibility of the student organization. All groups must abide by the following guidelines in planning the trip. This policy is intended to promote awareness, safety, and communication about organizational travel for students, and in no way is intended to imply responsibility for the event or travel by the University or University officials.

- **Travel Form**: All organizations planning to travel to any destination outside of Macon for the purposes of the organization (volunteer activities, workshops, conferences, meetings, retreats etc.) MUST FILL OUT a Travel Form and return to the Campus Life office no later than 48 hours **BEFORE** the date of travel. The Director of Campus Life may request a meeting to discuss all travel plans if deemed necessary.
- To receive bear grant refunds travel forms MUST be submitted **PRIOR** to the trip.
- **Advisor**: All student organizations recognized by Campus Life should have an advisor in attendance during any travels that takes the group over 60 miles away from Mercer University in Macon, GA. or that plan to stay overnight regardless of location.
  
  **All faculty/staff advisors of Mercer University planning to attend a student organization trip should refer to the Approved Drivers Policy on the Mercer website at [www.mercer.edu/payroll](http://www.mercer.edu/payroll) and call Benefits at 478-301-2699 to verify all policies and procedures.**

If a student organization wishes to proceed with an event and have no advisor present they can request by having the advisor of the organization write a letter (email is great) to the Director Of Campus Life (Carrie Ingoldsby: Ingoldsby_cf@mercer.edu) 48 hours prior to the scheduled event. This letter must include in the following information:

1. Date, Time, location and description of the Event
2. Who is responsible for any funding during this event? Personal or SGA?
3. What are the risks associated with traveling?
   - A. What steps the organization is going to take to alleviate any risks?
4. Who is responsible in case of emergency, during the schedule event?
5. What type of transportation will be provided?
   - A. Who will be providing the transportation (i.e student driver, company (ex.C&H bus line), etc.)

***NOTE TO ALL STUDENT ORGANIZATIONS: Failure to submit appropriate travel forms **BEFORE** travel could result in SGA funding being withheld even if you are asking for reimbursement for travel, you **MUST** submit travel forms **BEFORE** travel.
Club Sports Travel Policy:
SECTION SEVEN. TRAVEL
SECTION ONE – FUNDING
Article 1 – Approval. A travel form must be submitted to the Department no later than three (3) days prior to travel. This form must include:
- Destination and purpose of event
- Emergency contact information for all travelers
- Dates of departure and dates of return
- Estimated amount of club funds to be used for trip
- Name and contact information for hotel used
- Advisor signature

Article 2 – Club checks for travel. If a club needs checks written to an event for entry fees or any other fee, the club must notify the Department no fewer than two (2) weeks in advance.

Article 3 – Reimbursement. Preferably, teams should travel with an advisor or staff member with a University purchasing card. When this is not possible, teams may collect itemized receipts and fill out reimbursement forms when they return. No reimbursements will be given without a receipt, and sales tax will be deducted off of any reimbursement if paid. Clubs should contact the Department regarding tax exempt status and forms. When traveling by personal car there will be a limit to the number of vehicles that will be allowed depending on size of the team. This limit will be used to determine the number of cars that can be reimbursed for their gas expenses. All receipts must be turned in within 2 weeks of the return day to receive reimbursement, any receipts turned in after that time will not be reimbursed.

Article 4 – Meals. Club funds may only be used for team meals when approved by the Board of Appropriations in advance through the budget process or through other means.

g. Film/Movie Policy
All student organizations and departments that wish to show a movie/film on campus must first obtain the rights to show the movie. A film license for a specific movie can be obtained through whichever film company holds the rights to the movie-ex Swank Motion Pictures. This policy holds for educational events as well as social events. If it is being viewed in a public setting regardless of the reason, you must have the license to show it. Student organizations that violate this policy are responsible for ALL penalties/fees associated with showing movies publicly without the purchase of the film license.

Below is an explanation of the copyright laws regarding films per the Swank website (2011).

What the law says

The Federal Copyright Act (Title 17, United States code, Public Law 94-553, 90 Stat. 2541) governs how copyrighted materials, such as movies, may be utilized publicly. Neither the rental nor the purchase or lending of a videocassette or DVD carries with it the right to exhibit such a movie publicly outside the home, unless the site where the video is used is properly licensed for copyright compliant exhibition.
This legal copyright compliance requirement applies to parks and recreation departments, colleges, universities, public schools, day care facilities, summer camps, churches, private clubs, prisons, lodges, businesses, etc. regardless of whether admission is charged, whether the institution is commercial or non-profit or whether a federal, state or local agency is involved.

The movie studios who own copyrights, and their agents, are the only parties who are authorized to license sites such as parks and recreation departments, businesses, museums, etc. No other group or person has the right to exhibit or license exhibitions of copyrighted movies.

Furthermore, copyrighted movies borrowed from other sources such as public libraries, colleges, personal collections, etc. cannot be used legally for showing in colleges or universities or in any other site which is not properly licensed.

Unauthorized Public Exhibition of Movies

The concept of “public performance” is central to copyright and is the main issue of protection for these intellectual properties. Most of the persons participating in movie productions depend upon royalties for a major portion of their payment for work performed.

Royalties are the shares paid to movie producers, script writers, authors, computer programmers, playwrights, musicians, inventors, etc. out of the proceeds resulting from the sale, performance or use of their work. If these men and women lose ownership of their work and do not receive royalty revenue, much of which is collected through licensing fees, there will be little incentive for them to continue to invest their time, research and development costs to create future endeavors. If this happens, they must then look to the U.S. Copyright Law for assistance. Consequently, if their intellectual creations are being used by others who are not paying compensation (royalty) for the use, copyright law may need to be enforced.

h. Contracts!

All student organizations that hold a campus event requiring a contract for services (performance, lecture, vendor or production co. etc.) should consider the following guidelines:

- If a contract is $500 or more, please stop by the Campus Life office with a copy or email a copy to campuslife@mercer.edu for assistance in the contracting process. Professional staff within the office of Campus Life can assist with contracts (of any amount).
- Campus Life will not sign off on any contract and has no financial or legal responsibility for the contract or service.
- Student Organization Advisors should request and sign all contracts and should assist you with all aspects of the contracting process.
- The contract or agreement is to be made between Artist/Vendor and the student organization as purchaser and not Mercer University.

i. Other Policies for Student Organizations
**Shared Responsibility at Organizations Functions**: The following criteria will be used to determine what constitutes an organization function. This list should not be considered exhaustive.

A function is defined by any one or more of the following:

- Any gathering of members or persons affiliated with an organization, which an observer would associate with the organization for a purpose other than a regular business meeting
- Any event that is funded by the organization or by members of the organization who have gathered funding
- Any event that is advertised by the organization, or advertising at or affiliated with the event location states or implies the organization’s involvement
- Any event that is announced at an organization meeting
- Any event that executive board members acknowledge, are aware of, or participate in

The organization is expected to maintain and secure appropriate standards on the part of its members and guests. As elected leaders, the organization’s officers are responsible for ensuring the appropriate conduct of all present at the function and are responsible for any incidents or events that occur directly or indirectly as the result of the event. For Greek organizations specifically, Mercer upholds the position of Risk Management by FIPG, Inc., these policies can be found on the following website [www.FIPG.org](http://www.FIPG.org). For Greeks, all parties and social activities should be open to members and invited guests only with a sign-in list posted at all entrances.

**General Event Guidelines**

A. The host and the organization are responsible for the behavior of all guests at an event.

B. Adequate security personnel or other security measures to ensure safety of those in attendance is required. The organization must control access to the event at all entrances by having an organizational monitor at each entrance for the length of the event. There must be a single contact person who is in charge of the event. Organizations may be required by the Office of Campus Life to hire at least one Mercer Police officer to work the event, for current rates of Mercer police officer please contact the MERPO. The event must have a specific beginning and ending time. Loitering in nearby parking areas and facilities is prohibited.

C. Failure to adhere to specified time limits required of all events is prohibited.

D. Due to interference with academic programs and in respect for the University’s neighbors, no outdoor events involving bands or other excessively loud events are allowed from 7:00 p.m. Sunday to 7:00 p.m. on Friday. Exceptions may be appealed to the Director of Campus Life and Residence Life.

E. Outdoor events on Fridays or Saturdays must cease by midnight. Indoor events may continue until 1:30 a.m.

F. Indoor events on weekdays (Sunday – Thursday) must cease by 11:00 p.m.
G. Location of event is to be vacated and secured by 2:00 a.m. Any organization planning an event outside of these times must get approval from the Director of Campus Life.

**Interim Suspension Or Expulsion**

Usually, the status of a student or organization accused of violation of the Student Code of Conduct will not be altered until a final determination has been made in regard to charges. However, interim suspension or expulsion may be imposed if an administrative official determines that the continued presence of the accused on campus constitutes an immediate threat to one or more of the following: to the physical safety and well-being of the accused or any other member of the University community or its guests; of destruction of property; or of substantial disruption of classroom or other campus activities. Interim suspension may include all organizational activities or activities deemed necessary to protect the safety of the University community. In any case of immediate suspension or expulsion, the student or organization shall be given an opportunity, at the time of the decision or immediately thereafter, to contest the suspension or expulsion, and if there are disputed issues of fact or cause and effect, the student or organization shall be provided a hearing on the suspension or expulsion as soon as possible.

**12. Greek Life Policies**

**XVII. Greek Life Policies**

Greek letter organizations have traditionally assumed a very active role in contributing to the cultural, educational, and social life on Mercer’s campus. Sororities and fraternities are involved in educational programs, community service and philanthropic projects, and leadership development, in addition to providing a strong bond of friendship. The Panhellenic Council governs the four sororities represented at Mercer that are members of the National Panhellenic Conference (NPC); the Interfraternity Council (IFC) governs the eight fraternities represented at Mercer that are members of the North-American Interfraternity Conference, Fraternal Leadership Association or Phi Delta Theta; and the National Pan-Hellenic Council (NPHC) represents the three sororities and two fraternities at Mercer that are members of the National Pan-Hellenic Council. In addition to the guidelines below, Greek organizations will be held accountable to all policies found in the “Community of Respect” section of *The Lair*. When different, the Office of Campus Life/Greek Life policies supersede all council specific policies.

In order to foster community among the Greek organizations and to maintain close ties with the broader Mercer campus, all Greek organizations will reside in the Greek Village. Greek organizations maintain their recognized organizational status on Mercer’s campus by residing in campus housing known as the Greek Village, by demonstrating effective stewardship of those facilities, and by meeting all financial obligations resulting from the occupancy and upkeep of their houses. Please see the Greek Village Debt Policy and Greek Village Housing Lease for details. Any Greek organization that loses its university housing privilege for any reason also forfeits its status as a recognized Greek organization on Mercer’s campus. Exemptions may be granted for special circumstances by the Vice President and Dean of Students. Please note that only initiated members of the chapter can reside in the Greek Village. Freshman may not reside in Greek Village (status not based on credit hours).
For all Greek Life policies, please visit www.mercer.edu/greek

In addition to the guidelines below, Greek organizations will be held accountable to all FIPG, Inc. policies and procedures.

A. Membership Requirements for Greek Organizations

1. Requirements to Participate in Recruitment or Intake:
   a) All first-year students are welcome to participate in Formal Recruitment activities of Panhellenic and IFC.
   b) Each council has adopted its own GPA requirements for potential members. Please refer to that council’s guidelines for potential new member GPA guidelines.
   c) Each council/chapter has adopted its own guidelines related to community service and recommendation letters for potential new members. Please refer to that chapter or council’s guidelines for specific information.
   d) All second-year students (who have 30 credit hours or more and a minimum of 15 having been obtained at Mercer) may seek membership in an NPHC organization. Intakes are held throughout the year.
   e) Potential new members of any chapter must be a student at the Mercer Macon campus and reside in or near Macon without exception.

2. Requirements to be Initiated:
   a) Greek organizations that have GPA and hour requirements for new members must conform to the standards of their Inter/national headquarters or those of Panhellenic, IFC, NPHC; whichever is higher.
   b) All fraternities and sororities must request a verification of academic qualifications of all prospective initiates from the Panhellenic, IFC or NPHC Advisor prior to initiating any Mercer student. Students that do not meet the council standards may not be initiated into the chapter and included on the chapter roster or live in Greek Village.
   c) Greek organizations earning a semester grade point average during the most recent grading period which is below the Non-Greek Men’s Average or Non-Greek Women’s average must hold a shortened new member education program and initiate new members prior to the end of the term during which they pledge. If an organization exceeds the Non-Greek Men’s or Non-Greek Women’s average during the most recent grading period, they may wait until all grades are published before holding initiation but must initiate within the first two weeks of the following term.
   d) All fraternities and sororities must register all new member periods/intakes and pre-initiation/initiation activities with the Office of Campus Life BEFORE a process can begin. Please submit the appropriate form to the Office of Campus Life. The form can be found on the Greek Life website. No initiation activities may be conducted during Dead Week or the final examination period. Unless a chapter’s national office requires a chapter to wait for grades (please submit a letter from that office) then all chapters must initiate or complete intake by this time. **A new member period must conclude 15 days before the last day of class unless a chapter is required to wait for grades (please submit letter).** NPHC chapters should also notify the council advisor and the Office of Campus
Life one week before a probate is to occur. Details must be approved by the council advisor.

**B. Membership Recruitment of Greek Organizations**

Many Greek organizations participate in Formal Recruitment at the beginning of fall semester, although they are encouraged to recruit throughout the academic year as permitted by IFC, Panhellenic, and NPHC. In addition to the guidelines defined by IFC, Panhellenic and NPHC regarding ethical recruitment standards and the acceptable time periods for recruitment activities, organizations shall adhere to the following guidelines: (1) No recruitment activities may be held during University orientation periods and (2) No recruitment activity may be held on a weeknight after 11:00pm. **Additionally, all recruitment activities must be dry (non-alcoholic) functions.**

**C. Academic Requirements for Greek Organizations**

The Interfraternity/NPHC Council Policy for the Promotion of Scholastic Achievement requires all Greek organizations at Mercer to maintain a term grade point average of the entire membership which is no lower than a 2.50 in order to remain in good standing. Panhellenic follows the Green Book rules which allow each chapter to set their GPA requirements but no chapter may fall below the 2.5 minimum standard set by Mercer’s Office of Greek Life.

- **Level 1: Academic Probation.** Each semester grades will be reviewed to determine compliance. Greek organizations below a 2.5 will be placed on Academic Probation.
  - A letter from the Associate Dean of Students will be sent to the organization, advisors, regionals/nationals offices.
  - Semester grades will be reviewed for each chapter to determine academic good standing.
  - A meeting will be scheduled with the Chapter president, advisor, Greek Council advisor, their scholarship chair and the Associate Dean of Students to develop a **Study Plan** for the organization
    - The Study Plan may include chapter study hours, recommendations to attend academic support resources on campus, have study skills and test taking workshops for all members of the chapter, etc.
  - Chapters must track compliance of the study plan using a simple form that can be obtained in the Office of Campus Life.
  - A **contract** will be created between the organization and the Campus Life Office (which will be monitored by the Associate Dean of Students), and the details must be met even if the chapter increases their GPA through other methods.
  - At the end of the spring semester, grades will be checked for the chapter/s on Level 1 probation to determine if the chapter has met the required 2.5 chapter average.
Level 2: Social Probation. If a chapter fails to comply under the Level 1 plan, another meeting will be held with the organization and its representatives and correspondence sent to the regional/national office. Social probation may include any or all of the following restrictions for the organization until academic compliance requirements are met.

Chapters may be prohibited from having:
- All social activities on or off campus, which includes, but is not limited to the following: Chapter week, pageants, homecoming activities, intramurals, stomp fest, awards, formals, mixers, philanthropies, etc. or anything else determined appropriate by the Office of Campus Life and administrative staff.
- Exceptions would include one chapter meeting a week with a chapter advisor present for these meetings.

Level 3: Suspension. Semester GPA’s are checked for all chapters on probation at any level. Chapters that have not brought their semester GPA at or above the 2.5 minimum and are already on social probation (meaning three semesters below the GPA requirement) may be placed on suspension. Suspension may be considered at this point, but would not be automatic. Decisions would depend on the dynamics of why the organization has failed to meet good academic standing and include a thorough investigation as to the reason. This would be reviewed by the Office of Campus Life and the Greek Life Committee.

- The chapter may be restricted from being an active organization for at least one year and not permitted to live in the chapter house, which would be contingent upon the timing that social probation is determined as an appropriate form of recourse to address low academic performance.
- Once the chapter regains good academic standing (GPA will be checked at the end of each semester), it would be placed back as an active organization and monitored in accordance with this policy.

*Note. Any acts of failure to comply with guidelines outlined for organizations may be referred to the Office of Judicial Education for review under our Student Code of Conduct.

D. Reporting Requirements for Greek Organizations
In order to remain in good standing, Mercer requires that all Greek organizations file the following reports and documentation with the Office of Campus Life. Forms are available in the office and online.

**Please see the Schedule of Requirements for both Campus Life and Residence Life on the website for the complete list and timeline:

a) Membership rosters must be filed within 30 days of the beginning of each semester. Active, initiated members and new members must be designated clearly on the roster. Any changes or additions to the roster must be made within one week of the change and no later than the last day of class each semester.
Examples of changes to the roster include newly initiated members or disaffiliated members.

b) Officer and Advisor rosters and forms must be updated within one week following elections, when changes are made during the semester, and/or within 14 days of the beginning of each semester. All Greek organizations must list a Chapter Advisor and Faculty Advisor on their rosters.

c) The Grade release and Hazing Policy form must be filed with the Office of Campus Life in order for an organization to have access to its members’ grades. These forms must be filed immediately after new member recruitment programs, as well as within 14 days of the beginning of each semester to be turned in with the Chapter Roster and Advisor Information. Attached to the chapter roster. The scholarship chairperson is responsible for reviewing the organization’s grade release forms each semester to make sure the forms are up-to-date.

d) ALL INDIVIDUALS SELECTED AS CANDIDATES FOR NEW MEMBERSHIP OF A GREEK ORGANIZATION MUST ATTEND A MANDATORY WORKSHOP ON HAZING, ALCOHOL and SEXUAL ASSAULT and MUST SIGN ASSOCIATED PAPERWORK BEFORE BEGINNING A NEW MEMBER PROCESS OF ANY KIND. PLEASE WORK CLOSELY WITH THE COUNCIL ADVISOR TO SCHEDULE THESE FOR ALL NEW MEMBERS EACH SEMESTER.

e) The following documentation must also be on file with the Office of Campus Life at the beginning of the Fall semester and as changes or renewals take place:
   a. chapter by-laws
   b. requirements for membership
   c. procedures for disaffiliating members in any category,
   d. statements of dues and fees,
   e. new member education programs
   f. grade releases for all potential new members
   g. risk management policies
   h. liability insurance policies and certificate of coverage
   i. chapter calendar for the current semester
   j. awards information
   k. new member period/intake forms
   l. new members –hazing/alcohol/sexual assault workshop paperwork and tests
   m. anything else as deemed necessary by Office of Campus Life, Office of Housing and Residence Life or Student Affairs

f) All Greek organizations must maintain a house on campus with a current and active lease agreement, unless an exemption has been made with Student Affairs, the Office of Campus Life and the Office of Housing and Residence Life. Please note that only initiated members of the chapter can reside in the Greek Village. Freshman may not reside in Greek Village (status not based on credit hours).

E. Leadership Requirements

1. Council Presidents:

   Students who are interested in being elected to the position of President of any of the Mercer University Interfraternity, Panhellenic or NPHC Councils must demonstrate the following in order to be eligible:
   a) They are a full-time enrolled student at Mercer University, Macon campus (12 credit hours).
b) They have a minimum cumulative grade point average equal to or above the All Greek Average cumulative grade point average.
c) They must be in good standing with their individual chapters, inter/national organizations and Mercer University.
d) Complete and submit a semester update report to the council Advisor.
e) Attend the President’s Roundtable two times per semester.
f) Attend required events set forth by the council advisor.

2. Chapter Presidents:
Students who are elected President of their respective chapters must demonstrate the following:
   a) Meet with the council advisor/s and chapter advisor once per semester.
   b) Attend the President’s Roundtable twice per semester.
   c) Attend required events set forth by the council advisor.

F. Probation Policy
If the required information, documentation and leadership requirements are not met, or the chapter is found to be in violation of any Greek Life Policies the chapter will be placed on Probation unless other procedures are outlined (see academic standards). Probation means that the recognized Greek Chapter is permitted to remain registered only upon the condition that it complies with all university rules and regulations and with other standards of conduct which the organization is directed to observe for the duration of the period of the probation.

Probation may not exceed two semesters in duration for any given misconduct, except that violation of probationary conditions may be cause for extension of the probation for no more than two additional semesters or for suspension of some rights.

**At any time if a chapter violates a University policy or code of conduct the chapter will be subject to the Mercer University judicial process as outlined in the Lair.

Probation may include the suspension of some of the organization's rights such as but not limited to:

1. Disciplinary Warning: A disciplinary warning is an official written notice expressing disapproval of conduct and a statement that the conduct violates one or more University rules or regulations.
2. Probation: A chapter can be placed on probation for a specified period of time without the withdrawal of privileges granted to university organizations. For example, up to 30 days or less depending on the submission of missing material. Probation is a period of review during which the student or organization must demonstrate the ability to comply with Greek Life policies and regulations, and all other stipulated requirements.
3. Restricted Probation: A chapter placed on probation may be restricted from use of university facilities and/or all other university granted privileges afforded Greek organizations such as the right to reserve a space on campus for meetings or events, or the right to hold events on or off-campus.
4. Withdrawal of Recognition: A chapter may have its recognition withdrawn for a specified period of time depending on the offense and the outcome of the investigation.

5. Other: Any sanction noted in the Student Code of Conduct if the chapter is put through the Judicial Process.

*The disciplinary action taken against a Recognized Greek Organization does not exempt disciplinary action from being taken against individual members of the organization who were responsible for the violations of regulations and policies*

F. Starting a New Greek Organization:

Philosophy:
Mercer University is committed to striving for excellence, including fostering a strong and united Greek community on our campus. Inviting and maintaining chapters with strong ideals and values that contribute to the Mercer community is important. Mercer strives to find a good balance of IFC, PHC and NPHC chapters on campus. The following are the current polices in regards to expansion/extension.

In order to foster community among the Greek organizations and to maintain close ties with the broader Mercer campus, Greek organizations will reside in the Greek Village. Exception to this policy will only be granted as outlined hereafter. Greek organizations maintain their recognized organizational status on Mercer’s campus by residing in campus housing known as the Greek Village, by demonstrating effective stewardship of those facilities, and by meeting all financial obligations resulting from the occupancy and upkeep of their houses.

Requirements for All Interested Chapters:
To become a recognized Greek organization on the Mercer University, Macon campus, the petitioning student group must be a member of one of the four national groups (National Panhellenic Council, National Pan-Hellenic Council, Inc., North-American Interfraternity Conference or the National Multicultural Greek Council, Inc.), must submit a roster of interested members (a minimum of 7 full-time, undergraduate Mercer students on the Macon campus), representing different class standings, and each with a minimum cumulative grade point average which meets the standard of the council they will be a part of, when contacting the Office of Campus Life.

Request
1. Expansion/extension can be brought about in three ways:
   a. A student interest group can approach the Director of Campus Life and the local governing councils for recognition
   b. A national organization can contact the Director of Campus Life to express their interest in the university
   c. The governing councils at Mercer may petition to the Director of Campus Life when they would like to expand

NOTE: To become a recognized Greek organization on the Mercer University, Macon campus, the petitioning student group must be a member of one of the four national
groups (National Panhellenic Council, National Pan-Hellenic Council, Inc., North-American Interfraternity Conference or the National Multicultural Greek Council, Inc.), must submit a roster of interested students (a minimum of 7 full-time, undergraduate Mercer students on the Macon campus), representing different class standings, and each with a minimum cumulative grade point average which meets the standard of the council they will be a part of, when contacting the Office of Campus Life. Chapters that are requesting expansion through the formal process outlined will work closely with the Office of Campus Life in regards to any sort of on campus promotion of the potential chapter while going through the process.

**Required Documents**

2. Once the interest is expressed in any of the three ways, an expansion committee consisting of members from each of the governing councils, the Director of Campus Life, Assistant Director of Campus Life, Housing and Residence Life representative, a faculty member and the Associate Dean of Students will meet to examine the current balance of chapters, student trends in recruitment, size of student population, and housing availability in order to determine the need or ability to expand within the council being discussed. At which point if the decision has been made that the council is ready to and in favor of expanding, the following information must be presented to the Office of Campus Life in order to proceed in the process.

   a. History of the Organization
   b. Expansion/Extension packet: (needs to make sure to include)
      1) Risk Management Policies
      2) Proof of Liability Insurance
      3) Letter of National Support
      4) Scholarship Information
      5) Educational Programs (Drugs, Alcohol, Hazing, Sexual Assault)
      6) New Member Education Process
      7) Constitution/By Laws
      8) List of interested students (will work with Campus Life for info sessions/tabling)
      9) List of who would be the Alumni Advisor and Faculty/Staff Advisor
      10) Alumni support in the area
      11) Timeline for expansion
      12) Letter of support for the Mercer Greek Community, values and procedures
      13) Letter of support for the local governing council
      14) Philanthropy Information
      15) Programs and efforts typical of the organization
      16) If the organization had been on Mercer’s campus in the past, proof must be established that the organizations is in good standing with the university regarding judicial and financial matters

**Greek Village**

1. All Greek Organizations must maintain a house on Mercer’s campus in the Greek Village in order to establish and maintain their status as a Social Greek organization, except where otherwise stated or except those groups that have received an exemption following Greek Life policies. Any Greek organization that loses its university housing privilege for any reason also forfeits its status as a
recognized Greek organization on Mercer’s campus. The University will not, at any time recognize any chapter house off campus. Exception: In the event there are more chapters than houses available, chapters may request to be exempt from living in the Greek Village, and to reside in another residence hall (apartment/suite) in order to allow their recognition as a Greek organization. This exemption must be granted by the Office of Housing and Residence Life, Office of Campus Life and Student Affairs. Exemptions of this nature will only be granted for specific circumstances including member numbers below the required amount to fill the chapter house.

**Process:**

*Step 1:* Once the expansion/extension packet and information is received, the committee will meet to discuss the submitted information and decide whether more information is needed or if they would like to invite the organization(s) to campus to present to the committee and current Greek chapters.

*Step 2:* After the presentation, feedback will be provided by the chapters and a recommendation will be made from the committee to either extend an invitation to join the Mercer Greek community or not to expand at that time. The Vice President of Student Affairs/Dean of Students has the final authority in the recommendation decided upon by the committee.

a. If an invitation is extended to a chapter, the chapter will work closely with the Director of Campus Life and the respective council to revise and adhere to the expansion/extension plan.

b. If an invitation is not extended to a chapter, a letter briefly stating the committee’s rationale will be sent to the interested chapter(s).

*Step 3:*

a. For Interfraternity Council Organizations: Upon the recommendation of the IFC and with the approval of the Vice President of Student Affairs, the IFC Advisor will then follow the procedure for expansion as outlined within the Mercer University Interfraternity Council Constitution and By-Laws.

b. For Panhellenic Council Organizations: Upon the recommendation of the Panhellenic Council and with the approval of the Vice President of Student Life, the Panhellenic Advisor will then follow the procedure for extension as outlined with the National Panhellenic Conference.

c. For National Pan-Hellenic Council Organizations: Upon the recommendation of the University, NPHC will then follow the procedure for colonization as outlined by that organizations inter/national headquarters and the expansion policies of Mercer University.

d. For National Multicultural Greek Council Organizations: Upon the recommendation of the University, MGC will then follow the procedure for colonization as outlined by their By Laws and that organizations inter/national headquarters and the expansion policies of Mercer University.

e. The Vice President of Student Affairs/Dean of Students has the power to overrule the individual councils on their recommendation either to expand or not to expand.

*Step 4:* Upon the Vice President of Student Affairs/Dean of Student’s approval of the expansion committee and council’s recommendation, the Director of Campus Life will re-review the required documentation of the organization selected to join the
Greek system at Mercer and upon approval will extend an invitation to join the Mercer Greek Community.

*The Vice President of Student Affairs/Dean of Students makes the final decision in regards to expansion/extension, and any part of this process may be adjusted at his or her discretion.

**G. Exemptions to the Housing Requirement:**

2. Chapters may request a one year exemption from the Greek Housing policy if the chapter size consists of 9 or fewer members or 3 or fewer members for NPHC. This request must be submitted in writing to the Office of Campus Life and Housing and Residence Life by the end of the semester prior to the year the exemption is being requested.
   a. The exemption is only good for one year. At the end of the year, the chapter will be examined to determine whether or not they are financially able and of the appropriate size to fill a house. If the chapter is still at or below 10 members, they may request a year extension to the exemption.
   b. In the event of an issue mid-year, the chapter must work closely with the Office of Housing and Residence Life to determine the most appropriate course of action for the chapter and the housing office.

3. In the event there are more chapters than houses available, chapters may request to be exempt from living in the Greek Village, and to reside in another residence hall (apartment/suite) in order to maintain their recognition as a Greek organization. Permission will be granted only if there is a chapter of equal or greater size who is financially able and willing to move into their house. This would occur only in the case of expansion where more chapters than houses available.

4. At no time will a chapter be able to apply for exemption from living in the Greek Village if there is an open house, except if they are exempt under Exemption 1 for chapter size. If a chapter is currently residing in another residence hall and a house becomes open, they will be required to move into the house in the Greek Village in order to maintain 100% Greek occupancy in the Greek Village.
   a. Any chapter that does not occupy a house within the Greek Village or other University owned housing and does not have an exemption in writing, as agreed upon with the Office of Campus Life and the Office of Housing and Residence Life, will be in violation of Mercer’s Greek Life polices and will forfeit its recognition as a Greek Chapter.

5. For more information regarding the Greek Housing Exemption due to having fewer than 10 members, please see contact the Office of Campus Life or the Office of Housing and Residence Life.

**H. Greek Life Self-reporting Policy**

Under the Community of Respect, organizations are expected to investigate and self-report violations of the student code of conduct to the Office of Campus Life. Groups that quickly and accurately self-disclose policy violations will be given due consideration by Student Affairs in determining corresponding or additional disciplinary action by the University. Reports should contain a full account of what occurred, who was involved,
any sanctions imposed by the organization, and how the completion of the sanctions will be verified. However, the university retains the right at any point to pursue further action in either investigating the incident, implementing additional sanctions, or pursuing individual charges in any case.

13. Tax Info

IMPORTANT BANK/TAX INFO FOR STUDENT ORGANIZATIONS

All student organizations that are recognized by SGA will need a bank account in the organization name to receive BEAR GRANTS.
- To open an account the bank will need a tax ID number or EIN for the student organization. You may not use Mercer’s tax ID number. You will need a copy of your bi-laws and two people to serve as signors on the account.
- The signors can be officers or an advisor. It is recommended that you have an advisor as a signor so that when student’s leave Mercer there is someone that can assist with bank account transitions.
- See below for reporting requirements from the IRS once you have an EIN number.

Tax ID/Employer ID Number for Information for Registered Student Organizations*

Tax ID / Employer ID Number (EIN)
A Tax ID Number or EIN (Employer ID Number) is like a social security number for your organization. Student organizations are often in situations that require a Federal Tax ID Number (opening an organizational bank account, conducting fundraisers, etc.). Registered student organizations are not permitted to use the College’s tax identification number; therefore they are required to obtain their own EIN. The purpose of the EIN is so the IRS will not make any of an organization’s members personally responsible for taxes on revenue that the organization has earned. To get a Tax ID number, you may contact the IRS and request a Form SS-4 (Application for Employer Identification Number) or visit their Web site in order to request an EIN, see the

Apply for an EIN Online section below for steps to apply for an EIN online.

Tax Exemption
Student organization registration with the Office of Student Activities does not imply tax exemption. Only College departments and offices may use College’s tax ID number. An organization wishing to apply for tax-exempt status must realize it is a complex and cumbersome process. An attorney specializing in this area is probably necessary because the laws and procedures written for qualifying as a tax-exempt organization are confusing and constantly changing. If a student organization is qualified for tax-exempt status, it most likely will be covered under 501(c)(3) or 501(c)(7) sections in the IRS tax code and would file a form 1023. The application process will take a minimum of six months, but may last more than year before a tax-exempt certificate is issued.
Apply for an EIN Online
The following steps were written to assist a registered student organization* with applying for an EIN online. If you have any technical issues or have questions regarding the form, please refer to the IRS’ help and support services.
1. Go to the IRS’ Apply for an Employer Identification Number (EIN) Online Web site: http://www.irs.gov/businesses/small/article/0,,id=102767,00.html
2. Click the APPLY ONLINE NOW link at the bottom of the page.
3. Once you have read the instructions on the page, click the Begin Application button.
4. Select the View Additional Types, Including Tax-Exempt and Governmental Organizations option for the "What type of legal structure is applying for an EIN?" question and then click the Continue button.
5. Any of the following options may describe your type of organization: 1) Political Organization; 2) Church-Controlled Organization; 3) Community or Volunteer Group; 4) Social or Savings Club; or 5) Sports Teams (community). Once your selection is made, click on the Continue button.
6. To confirm your selection click the Continue button.
7. Enter your first name, last name, and SSN/ITIN.
8. Select whether you are an officer or member of the organization or whether you are applying for the EIN as a third party on behalf of the organization and then click the Continue button.
9. Enter the address information for your organization and click the Continue button when you are done.
10. Enter the requested information about your organization and click the Continue button when you are done. Repeat this step for the next screen requesting additional organizational information.
11. Select the Other option for the question "What does your business or organization do?" and click the Continue button.
12. Select the Organization option for the question regarding your business activity and click the Continue button.
13. From the list of organizational activities select the activity that best describes what your organization does (most organizations will select the Social or civic option and click the Continue button.
14. Select whether you would like to receive your EIN confirmation letter online or by mail and click the Continue button.
15. Once your receive the information, retain it in your student organization files for current and future leadership. Also, please feel free to provide the Student Organization Bank a copy.

MORE INFO REGARDING STATUS OF ORGANIZATION FOR TAX PURPOSES

Tax-Exempt Status

Student organizations are not Federally Tax-Exempt Non-profit Organizations. Only the federal government can confer charitable status on an organization. Filing for charitable status (501(c)(3) status) is a lengthy legal procedure which then commits the organization
to the rigorous annual reporting procedures required by the IRS. Because of the annual reporting requirements and the frequent turnover of student leadership, we do not encourage student organizations to file for charitable status.

**Organizations with Gross Receipts of Not More than $5,000 per Year**

An organization that normally has gross receipts of not more than $5,000 per year (see gross receipts test below) and which is organized and operated exclusively for tax-exempt purposes will generally be recognized as tax-exempt under Internal Revenue Service Code (IRC) Section 501(a) without applying to the IRS for approval of IRC Section 501(c)(3) status.

**Organizations with Gross Receipts in Excess of $5,000 per Year**

An organization that normally has gross receipts in excess of $5,000 per year (see gross receipts test below) and which is organized and operated exclusively for tax-exempt must formally request recognition of exemption in order to be recognized as an entity exempt from federal income taxes. The request is generally made on IRS Form 1023, Application for Recognition of Exemption under IRC Section 501(c)(3) of the Internal Revenue Code.* Where the form is timely filed, the organization will generally be treated as tax-exempt until the IRS acts on the application. In order to ensure that the Form 1023 is complete and accurate, it is strongly recommended that an organization seek professional tax assistance in completing this application.

*Note: Organizations which are not described in IRC Section 501(c)(3) may be required to file IRS Form 1024, Application for Recognition of Exemption under Section 501(a) or for Determination under Section 120, rather than Form 1023, in order to formally request recognition of exempt status.

**Gross Receipts Test**

The gross receipts of an organization are not more than $5,000 if: i) during the first taxable year of the organization, the organization received gross receipts of less than $7,500; ii) during its first two taxable years, the aggregate gross receipts received by the organization are $12,000 or less; and iii) in the case of an organization which has been in existence for at least three taxable years, the aggregate gross receipts received by the organization during the immediately preceding two taxable years plus the current year are $15,000 or less.

**ANNUAL IRS FILING REQUIREMENTS**

Organizations recognized as tax exempt under IRC Section 501(c)(3) are generally required to file an annual information return. The type of annual filing is determined by the organization’s annual gross receipts and assets.

**Important:** The Pension Protection Act of 2006 mandates that most tax-exempt organizations must file an annual return or submit an electronic notice with the IRS. The
Act also requires that any tax-exempt organization that fails to file for three consecutive years automatically loses its federal tax-exempt status.

**Organizations with Gross Receipts of Not More than $50,000 per Year**

Organizations with gross receipts that are not normally more than $50,000 per year (see gross income test below) must electronically submit IRS Form 990-N, also known as the e-Postcard, annually (unless the organization chooses to file a complete Form 990 or 990-EZ). The e-Postcard is due by the 15th day of the 5th month after the close of the organization’s tax year.

Note: Organizations that were not formally granted federal tax exempt status through the filing of either Forms 1023 or 1024, but that are recognized as tax exempt (because their annual gross receipts are not more than $5,000 and they are organized and operated exclusively for tax exempt purposes) should contact the IRS Account Services Unit prior to the initial e-Postcard filing at (877)-829-5500 to request the IRS to set up the organization’s account to allow filing of the e-Postcard. Organizations that received formal IRS approval of exempt status do not need to contact the IRS prior to filing the e-Postcard.

Further information on Form 990-N (E-Postcard) can be found at: [http://www.irs.gov/Charities-&-Non-Profits/Annual-Electronic-Filing-Requ...](http://www.irs.gov/Charities-&-Non-Profits/Annual-Electronic-Filing-Requ...)

**RESOURCES:**
All information below from the Harvard University Student Organization website and Yale University Student Organization website.