

Club Resource Handbook

Presented by



CAL POLY
College of Engineering

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Club Resource Handbook – College of Engineering

This handbook is designed to provide your organization with tools and information to create successful student spaces and activities. This is a supplement to the larger club and IRA guidelines and documents provided by Cal Poly.

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Spirit of Co-curriculars in CENG

Why your club/IRA is important!

Research consistently shows the value for students in engaging in co-curricular activities, and your club/IRA is one of the spokes of student success for the College of Engineering! Co-curricular activities allow students to build their community, engineering and leadership skills. Cal Poly recognizes two distinct types of student organizations: student clubs (ASI) and Instructionally Related Activities (IRAs). These organization categories enjoy the rights and privileges of recognition by the university but have unique funding approaches (page 9 has more info).

Justice, equity, diversity and inclusion

The College's diversity statement guides our principles for CENG co-curricular activities:

“The Cal Poly College of Engineering fosters an environment based in love, empathy and respect where all are supported, energized and empowered. Opportunities to contribute exist for all and a broad range of voices and experiences are necessary as we co-create our future. We are developing an inclusive community where everyone can be their own unique selves.” Check with the Associate Dean for Diversity and Student Success for training and funding opportunities to support your club's JEDI activities.

Your club's voice in CENG: Engineering Student Council

Engineering Student Council (ESC) serves as a medium for communication between engineering students, the College of Engineering, and the University in order to facilitate conversation and allow students to voice their opinions. Every ASI club should have an officer designated as the ESC representative who is committed to attending the general ESC meeting per term. These meetings are used to share information and discuss important issues such as club space allocation. Be sure to check out Cal Poly Now to find out the current ESC contact.

Safety

As a CENG club or IRA safety is essential. Expect that your safety protocols relevant to the work planned will need to be up to date for all Clubs/IRAs engaged in building and testing. Planned activities are assessed for safety hazards associated with materials and equipment used, and the processes, practices and training of personnel to be followed. The proposed locations for building and/or testing are integral to safety. New and returning clubs will be asked to self-evaluate for safety each year in spring through the Club/IRA assessment form available from ESC and the Dean's office.

Space

In general, the college has more clubs than spaces to house all the amazing activities. The current policy is for clubs/IRAs to apply for space allocation and re-allocation in fall. Please check with ESC to find out the timeline and rubric for space allocation.

How can CENG Advancement and Communications Help Your Club?

What is Cal Poly College of Engineering Advancement and Communications?

We take care of external communications for the College of Engineering like fundraising, publications, and alumni engagement. For clubs, this means helping you take advantage of outreach and funding opportunities, foster relationships with your donors, and reach out to new donors! The following list illustrates examples of these key activities using a real-world scenario for Society for Automotive Engineers (SAE). These same kinds of activities can help your club/IRA.

Strategies for fundraising and outreach

- **Example:** Discuss fundraising options for SAE
- Assess known corporate contacts and plan for Advancement team and club officers to get in touch with them
- Brainstorm new corporate sponsors & how to engage them in Cal Poly SAE
- Organize and consolidate alumni lists

Contact database kept up to date and existing relationships with:

- Corporate/industry partners, Alumni, Students, Faculty/staff
- **Example:** helping with finding correct contact information for alumni
- **Example:** SAE outreach to corporate contacts and alumni
 - Advancement team sends emails to known contacts with the SAE sponsorship packet
 - Working with CENG Advancement, SAE can update their internal Google Doc list of club alumni with the most up-to-date contact information for those alums

Outreach via CENG's social media reaches thousands of new people

- **Example:** The Cal Poly Engineering Facebook post about SAE and Danica Patrick reached almost 5,000 people!

Detailed gift history with donor information

- **Example:** Following the fundraising meeting, Advancement team sent SAE a list of all their account info for the last five years, including donors and amounts, so they could investigate who has given to the club and how to maintain these relationships

Help facilitate, organize, and promote events

- We can reach out to external audiences, such as corporations, alumni, and parents

Development Processes: Best Practices for Approaching Donors

Step 1: Determine fundraising priorities

- What are your intended areas of impact? (What are you raising funds for)

Step 2: Contact Advancement

- Contact the Advancement Coordinator to let them know you would like to start fundraising.
- If you want to give donors the option to pay by credit card, also request a personalized giving link.

Step 3: Create a plan and timeline

Working with your club's leadership team, create a plan and ideal timeline. When you've answered the questions below, share it with the Advancement Coordinator.

- **Who will we ask?**
 - Create a list of potential donors you a) have already been in contact with and b) would like to connect with.
- **What are we asking them to support?**
 - This can be a specific project, general club support, a sponsorship level, and/or sponsorship of an event (including their attendance at the event), etc.
- **How will we reach them?**
 - Print or digital communication.
- **When can we have our communication materials ready for review by?**
 - Keep in mind, any digital or printed communication materials that solicit funds must be approved through a process called Solicitation Review (see Step 5).
 - Once submitted, it will take at least 5-7 business days to be approved. Factor this into your timeline
- **When would we ideally like to reach out to donors by?**
 - Actual date may vary due to approval process

Step 4: Finalize contact list

Once you have shared it, advancement will cross reference your list with the donor database for accuracy

Step 5: Solicitation Review ***REQUIRED***

When your communication materials are ready for review, Advancement submits solicitation materials for approval (page 5)

Step 6: Send Approved Solicitations to Contacts

Step 7: Gift Arrival

Step 8: Acknowledgements

Step 9: Impact Reporting

- See page 6 for details on steps 7-9.

Development Processes: Sponsorships and Solicitations

Sponsorship Packets

- **Optional to Include:**
 - Club goals or mission statement, summary of each of the club priorities, highlights of recent club activities and accomplishments, testimonials, photos
- **Required to Include:**
 - Club Bio, Cal Poly and Club Logos, Cal Poly Branding
 - Ways to give (giving link or instructions and address to send a check)
 - Sponsorship Levels
 - Containing price breakdown and corresponding benefits
 - A note on the document specifying tax-deductible amounts, and premium amounts. Premiums are the dollar value of benefits offered. *You must state that these portions are non-tax-deductible.* **Example:** Donor pays \$150 to go to an event and receives a t-shirt (\$15 value) and dinner (\$20 value) at the event.
 - The premium amount is \$35 and is not tax-deductible
 - \$115 is the tax-deductible gift
 - On the registration form, the club must note this distinction

Solicitation Review

- **When is it required:**
 - When any printed or digital communication material solicits funding
 - Any new usage of a Cal Poly giving link
 - Fundraising Events that will bring in \$1000 or more
 - In which case you must submit a [Fundraising Event Form](#)
- **Why is it required:**
 - It ensures funding will be deposited correctly and efficiently and it maximizes professional tone
 - It is campus-wide procedure for all solicitation materials
- **How we will help:**
 - The Advancement Coordinator will assist by answering questions, providing necessary instruction and resources and submitting the Solicitation Review for approval
 - We help update giving links and refine solicitation materials
- **Steps for your club/IRA:**
 - Review [Solicitation Review Checklist](#)
 - Review the [Solicitation Review Intake Form](#)
 - Contact Advancement Coordinator – they will submit the form
 - **NOTE:** This process can take anywhere from 2 weeks to 2 months, so get started early and follow all guidelines in the links above.

University Communications and Marketing Standards

Why is it important to follow these standards?

“These brand guidelines give us the tools to tell the Cal Poly story in the most effective possible way. How we tell our story matters, and we tell it best when we tell it together.”

—Jefferey Armstrong
Cal Poly President

Brand Guidelines

<https://ucm.calpoly.edu/brand-guidelines>

Following Cal Poly Brand Standards is required if your communication materials include solicitation (i.e. sponsorship, requests for funding). Following the brand guidelines is one step on the Solicitation Review Process (all steps outlined on page 9).

- **Brand Platform & Position**
 - Review to understand the importance of aligning communications with our brand strategy.
- **Writing Guidelines**
 - The following will be most helpful in upholding the Cal Poly brand while writing for communication: Style Guide, Voice and Tone Guide, Abbreviations, Boilerplates
- **Visual Identity**
 - Cal Poly logos, Colors and Typography must be used in any communication materials that solicit funding.
 - A CENG Logo Lockup, as pictured in the title page, and can be requested by contacting the Advancement Coordinator.
 - Typography
 - A Cal Poly Adobe subscription is required for use of Abolition and Utopia. Faculty and Staff have access to adobe applications, and as a student you can qualify for a student discount for Adobe. However, it is not required.
 - If you only have access to Microsoft Word, use Source Sans Pro, Georgia, and Trebuchet.
 - The Email Signature will be a helpful page <https://ucm.calpoly.edu/email-signature-guidelines>

Receiving Gifts, Acknowledgements, Impact Reporting

Receiving Gifts

- Gifts can take between 1 week and 1 month to be processed once they arrive on campus.
 - NOTE: If they are not addressed properly, they may get lost which increases processing time
- If you are expecting a gift, it is helpful to let the Advancement team know it is arriving soon. Email the Advancement Coordinator with the below information:
 - Club Name
 - Gift Amount
 - Donor Name or Company name
 - Which account it should be deposited to
- If you are expecting funding from a Cal Poly department or College, these dollars are received via internal funding transfers. Please provide the fund number of your IRA (starts with MO) or club (starts with a 7, 8, or 9) in order for the dollars to be transferred.
- If you are receiving funding that will be deposited into ASI club, please contact ASI club services at 805-756-5807 or asiclubservices@calpoly.edu

Acknowledgements

- University Development mails receipts to all donors, if a donor loses a receipt, a new one can be requested
- Digital Acknowledgements (Email thank you messages) are sent by CENG within 2 weeks of receipt. Handwritten Acknowledgements are mailed to those with no email address on file
- If your organization would like to write a thank you note, the Advancement Coordinator can provide addresses.

Impact Reporting

- Many corporate donors require impact reports for the funding/grants they provide. Being able to reflect and show a donor how their gift made an impact can help create an ongoing relationship to support your club/IRA in the future.
- When these gifts arrive, the club president and advisor will receive an email with the **CENG Gift Acceptance Form – Impact Report (1/2)**
 - In this form, please outline the intended use for the funding.
 - Whoever submits the form will be contacted later in the year to provide an update on the status of the gift impact.
 - It can be found here: <https://forms.office.com/r/swj27dKYED>
- **CENG Impact Report (2/2)**
 - Later in the academic year, you will be asked to provide a statement of impact
 - You only need to fill out this form when it is emailed to you by CENG Advancement
 - It can be found here: <https://forms.office.com/r/xLytLHKiel>

What to Know Before You Spend

Cal Poly recognizes two distinct types of student organizations: student clubs and Instructionally Related Activities (IRAs). These organization categories enjoy the rights and privileges of recognition by the university but have unique funding approaches.

What is an IRA:

An Instructionally Related Activity (IRA) is an "out-of-class experience" that provides enrichment to students and enhances their learning at Cal Poly. Funding for recognized IRAs is provided through student fees. All IRA programs/activities are partially sponsored by an academic dean or department and are "integrally related" to a formal instructional program.

IRA Funding Information:

- Each IRA has a distinct fund number that starts with MO and adheres to an annual budget review and approval process.
- IRA funds must be spent based upon the categories requested and approved each year.
- Private donations may be solicited and spent outside of approved budget categories.
- Regardless of funding source, IRA's can only expend on items Cal Poly allows. The following transactions are never allowed:
 - Food for meetings or social events (does not include conference meals)
 - Gifts or charitable contributions
 - Alcohol or tobacco products
 - Salaries or stipends for faculty/staff positions
- To spend outside of your approved budget, please contact the CENG Director of Finance.
- To spend IRA funds or obtain a fund balance, please speak to your advisor to determine your proper department admin. Please follow your department's guidelines for expenditures.
- For further guidance, please see the IRA handbook: <https://content-calpoly-edu.s3.amazonaws.com/academicprograms/1/documents/ira/IRA%20Manual%2020211104.pdf>

What is a Club:

Officially recognized clubs at Cal Poly are created to promote healthy behaviors, meaningful interpersonal relationships, independence, collaboration, social responsibility, satisfying and productive lifestyles, and appreciation for diversity, spiritual awareness, and achievement of personal and educational goals. ASI is a partner with the University, charged with administering day-to-day club operations, including fiscal support.

Club Funding information:

- Each Club has a distinct five-digit fund number that starts with a 7, 8, or 9 and adheres to an annual budget review and approval process.
- Operating budgets shall be created annually. The development and approval of the budgets will include input from ASI staff, ASI student government leaders and campus budget staff. The ASI Board of Directors and University Union Advisory Board will review and approve

- annual budgets.
- Private donations may be solicited and spent outside of approved budget categories.
 - Regardless of funding source, clubs can only purchase items allowed by ASI Club funding. The following transactions are not allowed:
 - Expenditures to directly support or oppose any candidate for public office.
 - Charitable donations
 - Alcohol or tobacco
 - Door prizes, awards, gifts (including gift cards/certificates)
 - To spend ASI Club funds, invoices and reimbursements are processed through ASI Club Services. Only presidents and treasurers can submit Purchase Requests through Poly Now.
 - For expenditure questions or to update your budget, please contact ASI Club Services at 805-756-5807 or asiclubservices@calpoly.edu
 - For further information, please see the ASI website at: <https://clubs.calpoly.edu/asi/asi-club-services>

CENG Dean's Office Contacts

Name	Position Title	Email	Phone Number	When to Contact
Madeline Pascal	Dean's Office Coordinator	mapascal@	805-756-2131	<ul style="list-style-type: none"> • General Dean's Office or CENG Inquiries • Space reservation assistance: ATL, Bonderson 104, Bonderson 203
Isabella Walker	Advancement Coordinator	iswalker@	805-756-5374	<ul style="list-style-type: none"> • Solicitation Review approval • Logo, typography, brand help • Fundraising or gift arrival questions
Talisha Mottinger	CENG Director of Finance	tmotting@	805-756-2131	<ul style="list-style-type: none"> • Budget Questions
Zoë Wood	Associate Dean of Diversity and Student Success	zwood@	805-756-2131	<ul style="list-style-type: none"> • Purchasing Issues • Club/IRA approvals (new and ongoing) • Training and funding opportunities for JEDI activities
ASI Club Services		asiclubservices@	805-756-5807	<ul style="list-style-type: none"> • Expenditure Questions • To update your budget • Invoices and reimbursement