

# CDM STUDENT LEADERS HANDBOOK

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## **STUDENT LEADER ROLES**

### **STUDENT LEADERS**

Student leaders are defined as those who hold elected positions in student council, student clubs, orientation committee, ASDA, and Student Government.

Student leaders must be aware and must adhere to all the policies set forth in this handbook. The Office of Student Affairs is always available to assist and advise on matters related to these policies.

### **STUDENT GOVERNMENT**

CDM Student Government Association is known as SGA. All current students at CDM in good academic standing are eligible to become members of SGA. SGA is made up of the elected class officer for each of the 4 years. SGA is responsible for planning and execution of events, such as the CDM Fall BBQ, Spring Formal, and other functions throughout the year. They are also responsible for the yearbook, budget oversight and management, and club sponsorships. The Vice President for SGA will serve as CDM Club Leader, working closely with the Student Activities Director on oversight of all CDM Clubs.

### **WHAT IS THE CDM CLUB?**

Founded in 2014, the Club currently sponsors over 30 CDM-recognized clubs and organizations. These organizations represent CDM students' vast interests and talents, including athletics, performing arts, student advocacy, culture, spirituality, professional networking, and community service. The Club's fluid nature allows new activities to arise as students' interests evolve. By providing CDM students with outlets for their various interests and talents, the CDM Club adds substantial depth to a program otherwise devoted to scientific and clinical disciplines.

<http://www.cdmsga.com/>

The CDM Club consists of the Director of Student Activities, CDM Clubs and the CDM Club Cabinet. We provide support and advisement to all of the organizations, assisting students in making them successful. In overseeing the clubs, all finances for recognized student clubs are maintained by the Director including class funds and major CDM Club events and activities. The CDM Club oversees and approves all events planned by student organizations on campus. While we provide advising services and encourage all students to participate in campus life, we understand that academics are the priority and you should not forgo your studies for participation in student organizations. The CDM Club works closely together with faculty and administrative departments to ensure a seamless academic experience, to help facilitate the implementation of new initiatives, and to communicate changes in services and/or policies that students need to be aware of. The CDM/SGA office is located in P&S 3-452C.

### **DIRECTOR OF STUDENT ACTIVITIES**

The Director of Student Activities will act as the advisor to all recognized CDM Club student organizations, Student Class Officers, ASDA Officers, and SGA Officer. The Director works with students to develop and carry out a wide variety of campus activities. Student organizations should keep their advisor updated on the

activities of the organization throughout the year. The Director will provide budgetary oversight for all Club activities, SGA finances, ASDA finances, class council expenditures, and planning of events.

### **CDM CLUB REPORT CABINET**

The CDM Club Cabinet is comprised of the SGA President, Vice President, and Treasurer, as well as each Class Council Vice President. . They meet regularly with the Director of Student Activities and are responsible for CDM activities. Additionally, they assist the Director in planning and implementing annual events such as the CDM Club Fair. They also oversee the preliminary evaluations for new club proposals.

### **CDM CLUB ORGANIZATIONS**

American Academy of Pediatric Dentistry

American Association of Public Health Dentistry

American Association of Women Dentists

Aesthetics Club

Alpha Omega Fraternity

American Student Dental Association

Bloom Girl's Mentorship

Chinese American Dental Association

Endodontics Club

Heights Helpers

Hispanic Student Dental Association

International Oral Health Association

Italian American Student Dental Association

Korean American Student Dental Association

Michael Yuan Orthodontics Club

Michael S. Yuan Student-Run Free Clinic

Oral Pathology Club

Periodontics Club

Roser Society of Oral and Maxillofacial Surgeons

South Asian Student Dental Association

Student Profession and Ethics Association

Student Business Organization

Student Government Association

Student National Dental Association

Tau Sigma Tri-service Military Club

William Jarvie Research Society

Xi Psi Phi (ZIPS)

## CLUB LEADERS RESPONSIBILITIES

The role of being a CDM Club Leader entails more than just leading an organization. Your activities and behavior as a club leader are not only viewed by other students, but also by the Columbia and general community. Your actions reflect back on the CDM Club when you associate yourself with the university. As a club leader, you are held to a higher standard and are expected to behave in a manner that reflects these standards. Your role(s) is (are) to help facilitate the process of academic, philanthropic, and social activities while respecting the diverse interests of the campus community. We expect you to serve as a role model and make decisions related to your club that would be deemed appropriate by the Director of Student Activities and the University as a whole.

The club leader term runs on the academic year. By accepting the leadership role of a CDM Club organization, the officer agrees to abide by the following guidelines:

1. Mandatory attendance and participation in (all dates TBA by the Director for Student Activities):
  - a. CDM Club Leader Meetings
  - b. Fundraising efforts by the CDM Club
  - c. CDM Club Fair
2. Prompt submission of the following materials and response to all emails and requests by the Director of Student Activities in a timely manner (all dates TBA by the Director for Student Activities):  
(\*\*submission within xx days?\*\*)
  - a. Post Event Evaluation Forms within 10 days of the event
  - b. End of the Semester Reports- Including budget proposal for following year
  - c. Updated Club Constitution
  - d. Club membership list & newly elected club officers for the following year by May 1st
  - e. Any updates of documents or waivers as needed by your organization
3. Events and Finances
  - a. Inform Director of all events hosted or co-sponsored by your organization and expenses incurred for each event. For larger events, you are responsible for meeting with the Director *at least* a month prior to ensure timely payments, date availability, and event approval.
  - b. All receipts & paperwork for reimbursements must be submitted to the Director within 24 – 48 hours of the event.
  - c. Always use a tax-exempt form, as you will not be reimbursed sales tax on any purchases made on behalf of your organization.

- d. Follow all legal and safety guidelines as determined by Columbia University and CUMC (refer to pages for Columbia University and Medical Center Policies & Procedures).
- e. Use the room reservation system (Resource 25) only for club/organization use and clean up after your events.
- f. Make sure to properly advertise and promote your events to ensure maximum attendance and participation.
- g. Serve as a liaison from your group to other clubs, departments, and outside entities.

## ESTABLISHING A NEW CLUB

To continue to meet the needs of its members, the CDM Club encourages students to establish new and interesting opportunities that adhere to the mission. All those wishing to establish a new club must adhere to the following procedure:

1. Students interested in establishing a new club must meet with the Director of Student Activities to discuss their idea. This meeting will ensure that efforts are not being duplicated and will help the group define their goals and mission statement for the new club/activity.
  - a. Proposals will be evaluated twice each academic year (October and January). Please contact Student Activities Director for upcoming dates.
2. After the initial meeting, a new club proposal must be submitted to the CDM Club Leader through the online survey posted on CDM Club website under the "Club Leader Resources" tab. Information required includes:
  - a. A list of organizers, club chairs and interested participants from the CUMC campus – with email contact information, school, and class affiliation
  - b. A list of any interested faculty supporter or advisor, if applicable
  - c. A list of any other forms of support for the proposed group, i.e. financial, moral, organizational. Note: Special Interest Groups must also include departmental support in planning/hosting events, but is not required to include financial support (although this would be helpful)
  - d. A statement as to why you feel this organization should be part of the CDM Club: what this group would gain by being a CDM Club organization and conversely, what the CDM Club would gain from recognizing this organization
  - e. Membership information and guidelines
  - f. A detailed proposed budget and activities for the coming year

Please note that submitting a proposal does not guarantee the organization will be recognized, as it must be evaluated by the appropriate groups (see below). Not all activities warrant club status; sometimes the program can operate out of an existing club instead of being an individual entity.

3. Before being granted approved recognition, proposals will be evaluated to ensure that the students feel the organization is needed and/or strongly supported by CDM students. Although students from

all across CUMC are welcome to start, run, and be members of clubs, a new club must be supported by the medical students of CDM.

- a. Club Approval
  - b. The first step is for the CDM Club Cabinet to review and approve the organization's proposal. If there are reservations regarding the proposal, it may be denied and suggested for reevaluation in the future.
  - c. If the Cabinet votes to approve the proposed club, the second step is to be approved by SGA at their next monthly meeting.
  - d. Once the group is approved, they will schedule a meeting to review CDM Club policies and club training materials.
4. Denial of Club Recognition
- a. If your group is denied recognition and you would like to re-apply, please consider the feedback provided by the CDM Club Leader from the CDM Club Cabinet evaluation. Often there has not been enough CDM student support or faculty support, the effort is already happening within another organization, or the effort could be categorized as a SIG instead of a club. We strongly encourage students who are passionate about their idea to speak to the CDM Club Leader and re-submit their club/SIG proposal.

## OFFICIAL CLUB RECOGNITION/REGISTRATION

Once recognized as a club at CDM, the organization must follow the guidelines outlined below to remain an active and recognized club:

1. An organization's registration is valid for one academic year starting in June and ending in May. This registration does follow the leadership timeline, as that runs on an academic year due to the CDM curriculum.
2. Student organizations are required to re-register their organization by submitting their Spring End of Semester Report at the end of the each spring semester as determined by the CDM Club Leader. As club leadership will differ between the Fall and Spring semesters of an academic year, the new officers should work with the previous year's officers in order to complete these forms, as needed.
3. You must complete these mandatory tasks in order to maintain an active organization:
  - a. Participation in CDM Club Fairs, Fund Appeals, Training(s)
  - b. Having listed active club officers (at least 1 should be listed)
  - c. Planning events, having meetings, having members, and carrying out your organization's mission
    - i. Even if you are not spending CDM Club money, it is mandatory for you to let the CDM Club know what you are doing and what type of events you are having, including ones being co-sponsored by a department. We need to be aware of all activities.
  - d. Developing a constitution and submitting an updated one annually with their Spring End of Semester Report (see constitution guide for guidelines and samples).
4. If a student club does not have any club leaders, an active membership body with events, and/or does not adhere to the above they may be considered inactive and will/can:
  - a. Have their CDM Club assigned budget withdrawn for the next academic year.
  - b. Be removed from the list of active clubs and be listed as temporarily inactive.

Temporary Inactive Status will be placed on an organization after one academic year of being inactive. It is a three year process to be completely disaffiliated, so during this time a club can be reinstated if a student decides to take on the leadership role, meets with the CDM Club Leader, and submits the online reactivation survey

*Example:*

Fall/Spring 1- Required tasks are not completed

Fall/Spring 2- Move to Inactive 1 and continue to neglect tasks

Fall/Spring 3- Move to Inactive 2 and still are not completing tasks- at the end of this academic year you will be disaffiliated. Once a group is disaffiliated, reactivation will require a new club proposal to be approved by the Cabinet and Faculty Advisory Board (see previous page for proposal guidelines).

## SENDING OUT COMMUNICATION

If and when student leaders need to send out mass communications to fellow students, they must first check with the Office of Student Affairs. Student Affairs can forward e-mails on behalf of clubs and student leaders. Certain SGA officers and student leaders will be given access to the listservs based on their leadership roles and need for access.

## CONSTITUTION GUIDE

All recognized CDM clubs and organizations must submit an updated constitution when submitting Spring End of Semester Reports to the CDM Club. This document will help future leaders run the organization. Please ask the CDM Club Leader, previous officers, and your active members for assistance in working on this document. Once it is created it will only require annual updates as needed.

1. Name: Name should reflect the purpose of the organization
2. Mission Statement: Main purpose of your organization (1-2 sentences)
3. Purpose: Why does your organization exist? What does your organization wish to accomplish?
  - a. **\*\*Examples:** Promote harmony among students, staff, and faculty...Advocate on behalf of...Provide an environment that supports...
4. Membership: Who is considered a member and what are their rights?
  - a. Who is a member? Submit a list of current members (active and inactive)
  - b. Who can be a member? Generally, membership is only open to CUMC students; however some groups might have open membership to include CUMC faculty & staff, NYP employees, etc.
    - i. Active Membership Status – what is required to be considered an active member (i.e. dues paid, signed waiver, etc)
    - ii. Inactive Membership Status – what leads to inactive membership
  - c. Voting Privileges

- i. Only members who have active status?
  - ii. Attended a certain number of meetings?
  - iii. Attended at least half of organizational required and/or sponsored functions?
5. Governing Structure/Officers: You are required to have at least one club leader for your organization, but you may have as many leaders as is appropriate for your organization. What other positions does your group need? (I.e. Vice President, Secretary, Treasurer, Events Coordinator, Student Advisor, Past President, etc.) It is up to you how you are going to structure your organization and title the position(s) – some or all positions can be incorporated within the general club leader position or have separate responsibilities.
  - a. Appointments/Election: How are officers appointed/elected? (Majority vote, 2/3 vote, consensus, volunteer, interview, etc...)
  - b. Removal of officers: If questions regarding an officer were to arise, how is an officer removed from office?
  - c. Officer Duties: Define the duties of each office; this will help with officer transition from year to year. Officer positions are generally held for one calendar year (January - December). (i.e. Club Leader: Attend meetings or arrange for an alternate, relay minutes from meetings to members, represent/advocate concern of members in public and private)
6. Amendment of Constitution: How is your constitution amended? (i.e. The constitution may be amended at any meeting subject to the following: 2/3 of the voting membership in attendance must vote to accept the amendment)
7. \*\*Note: Any changes must be submitted to CDM Club for final approval. At no time should anything in your constitution contradict or override CDM or University policies, as well as federal and state laws.
8. Please see the Director with any questions or concerns.

## COLLEGE & UNIVERSITY POLICIES AND PROCEDURES

As a CDM student at Columbia University, you are responsible for being aware of all policies that affect both your individual behavior as well as your club/organization. This includes Columbia University policies, CUMC policies, and the College of Dental Medicine specific policies: <http://dental.columbia.edu> (student affairs policies). The strictest of these policies shall supersede any others, as no policies can override University policies.

If your organization or individual behavior in relation to the CDM Club violates any of the policies listed, you may be subject to discipline from the CDM Club and/or CDM Student Affairs. Such cases include, but are not limited to: hazing, discrimination, vandalism, theft, alcohol or substance abuse, dishonesty, or misappropriation of any funds. Violations may result in student organization privileges being revoked, including recognition & budget. Any alleged violation will be reviewed; the CDM Honor Code and Professionalism standards will be applied. The University assumes no responsibility or liability for activities conducted off campus.

Every student organization leader has the duty to take all reasonable steps necessary to prevent infractions of University rules growing out of or related to the student organization's life. The specific steps necessary to avoid this liability (or to mitigate consequences) will vary according to the circumstances of the situation, the seriousness of the behavior, and the possible harms which could have arisen from the behavior. Where more serious behavior and harm is in question, the student organization's leader has the duty to take clear and firm action that is reasonably calculated to prevent and/or cease the behavior in question.



## RISK MANAGEMENT

### Alcohol Policy

<http://www.essential-policies.columbia.edu/policies-alcohol-and-drugs>

There is a University policy on alcohol, which is part of a larger policy statement on alcohol, drugs, and smoking. All Medical Center students are expected to comply with the laws and with University policies. Copies of the University policies are available in the Student Affairs Office of each CUMC school and program in the CUMC Office of Housing Services.

1. As this is a Medical Center campus, we have a particular responsibility to recognize that alcohol misuse and dependency are very serious personal and public health problems. All members of the Medical Center community are expected to be sensitive to the difference between responsible and irresponsible serving and consumption of beer, wine, and other alcoholic beverages.
2. As CUMC is largely a graduate student campus, we operate on the presumption that our students are adults who are responsible for their own behavior, and the procedures we adopt reflect this fact. At the same time, as in the society at large, specific guidelines and procedures are necessary to clarify expectations of behavior and to protect and promote the welfare of the larger community. When alcohol is served at student-sponsored events, the students in charge of the event are responsible for assuring that moderation is exercised in the amount of alcohol purchased and served, that both alcoholic and non-alcoholic beverages are available, and that food is served. In addition, at every student sponsored event where alcohol is served, at least one student must be designated to ensure that the event is in compliance with the policies outlined here (see numbers six and seven below). Individual students are responsible for moderating their own consumption of alcohol.
3. In compliance with University policy, no alcohol is to be served to a person who is disorderly or who is or appears to be intoxicated.
4. While most Medical Center students are over 21, not all are. State law prohibits the serving of alcohol to anyone under the age of 21. As prescribed by law and by university policy, no individual on the Medical Center Campus shall be sold, served, given, or otherwise receive alcoholic beverages if that individual is not at least 21 years of age. Any student-sponsored function where there is a possibility of students attending who are not yet 21 must pay special attention to and comply with procedure number three in the section on procedures (see below).
5. Respect for personal and property rights must be maintained at student events where alcohol is served. When a student-sponsored event takes place in a residence hall or other University space, there must be a designated student(s) responsible and accountable for assuring that University and Medical Center policies and procedures are known and complied with. Any damage to property resulting from disorderly or intoxicated conduct will be the financial responsibility of the students involved in such conduct. If the identity of the students cannot be determined, the group sponsoring the event during which property damage occurred will assume financial responsibility.
6. Designated students responsible for upholding the alcohol policy at an event must participate in a training sponsored by the AIMS (Addiction Information and Management Strategies) program

through the Center for Student Wellness. The training will cover skills related to the points identified above, particularly:

- a. procedures regarding the identification of under-age students;
  - b. procedures regarding the intoxicated student (non-admission, no further service, control of behavior);
  - c. procedures for controlling the serving of/access to alcohol.
7. Students whose behavior under the influence of alcohol or other drugs becomes a public matter (e.g., call from Security for health reasons, damage to property) will be required to meet confidentially with the Director of the AIMS program to discuss the incident.
  8. Because of issues related to professionalism outlined in the CUMC Alcohol Policy, repeated occurrences related to number eight above may warrant involvement of the appropriate Student Affairs Dean.

### Procedures to Be Followed

These procedures are to be followed for all student-sponsored events in University space where alcohol is expected to be served.

1. Prior to reserving space, the student or student organization sponsoring such an event must file a plan with the appropriate office. The appropriate offices are as follows:
  - a. The Medical Center Office of Housing Services for Bard Hall and Georgian Apartments.
  - b. The relevant office of student affairs for all other space, including the Riverview Lounge.
2. If sponsoring students are from more than one school or program, the event must be registered with each of the relevant schools and programs.
  - a. Copies of the University Policy on Alcohol and the Guidelines and Procedures to Implement the University Policy on Alcohol on the Medical Center campus will be available in each of these offices. Student sponsors are responsible for knowing these policies and complying with them.
3. If there is any possibility that individuals attending the event may be under 21, the event must be supervised in accordance with University policy. A designated individual or individuals must be responsible for checking the IDs of all students to assure that no one under 21 is served. Students have the option of hiring a paid proctor to carry out this responsibility or designating one or more of their own number to do so. This individual(s) must be identified by name in the plan and may not drink prior to or during the time he/she is proctoring.
4. The plan that is filed must contain the following information:
  - a. Sponsoring student(s) and, where relevant, organization(s).
  - b. Students' schools or programs.
  - c. Date or dates of the event.
  - d. Location of the event.
  - e. Number of people expected.
  - f. Whether any individuals attending may be under 21. If so, the plan must indicate how IDs will be checked and by whom, and whether the event will be supervised by a paid proctor or by the sponsoring students.
  - g. Hours the space is needed for setup, for the event, and for cleanup
  - h. Hours during which alcohol will be served. Note: No alcohol may be served after 1:00 a.m.

- i. Alcoholic beverages to be served
  - j. Planned number of beer kegs to be served. Note: One keg of beer serves about 75 people with two 12-ounce glasses (gross) each).
  - k. Nonalcoholic beverages to be served.
  - l. Food to be served.
  - m. The names of individuals who will be responsible for setup and cleanup. Note: At the end of the event, the sponsoring students must remove the taps from all kegs.
  - n. Forms for providing the required plan information will be available in the student affairs offices of each of the schools and programs, in the Office of Facilities Management where space is scheduled, and in the Bard Hall Office of the Assistant Director of Residence Halls, Medical Center.
  - o. These guidelines and procedures in no way supersede or substitute for the rules and Dean's Discipline of the individual schools and programs nor for the policies and rules of the Medical Center Office of Housing Services. These policies and guidelines will be reviewed on a regular basis.
5. *Hazing*: University policy and state law (New York Penal Law Section 120.16 and New York Education Law Section 6430), prohibit what is often referred to as hazing. If you are hazed, you must report it to the Director of Student Activities and CDM Club. In accordance with New York Education Law Section 5430, the rules and regulations listed on FACETS supplement existing University rules and regulations for the maintenance of public order on University campuses and other University property used for educational purposes: Hazing derived from the Essential Policies for the Columbia Community: <http://www.essential-policies.columbia.edu/university-regulations#Hazardous>

## FUNDRAISING & SALES

Occasionally, limited on-campus fundraising or sales activities may be conducted by recognized organizations. Applicants who wish to engage in fundraising or retail sales activities are subject to the following conditions:

1. All fundraising efforts, events, and activities on the part of student organizations must be approved by the Student Activities Director before ANY initiative can be executed.
2. Use of net proceeds from such sales will be limited to the support of:
  - a. Programs and services of a registered organization, university department, or unit
  - b. Charitable organizations - proposals must include an original letter from the charitable organization stating they're aware of & approve the fundraising endeavor on their behalf
  - c. Individuals whose sales activities are part of a defined academic program
3. Fundraising and sales proposals must include actual samples or detailed descriptions of all products and services to be offered for retail sale.
4. Any products with CDM logos or the College's name must first be approved by The Office of Student Affairs before orders are placed or products are sold/distributed. Use of the Columbia University name, The College of Dental Medicine, and other entities cannot be used without following appropriate guidelines: <http://www.columbia.edu/node/4777.html>

5. Be aware that it is against University policy to have fundraisers at a bar when using the Columbia University name.
6. Depending on the situation, we may recommend that the CDM Alumni and Development Office become involved with your fundraising effort. Again please speak to the CDM Student Activities Director before moving forward with any fundraising activities.

**\*\*Note:** CDM reserves the right to withhold approval of the sale of any product or service, and to terminate the fundraising activity or sale of products not submitted for advance approval.

## BUDGET AND FINANCES

To help keep track of your club's funding needs, you should keep track of your budget in two ways: Itemized budget 1: by event organized by date Itemized budget 2: by category- food, supplies, travel, entertainment, etc.

1. All recognized and active student organizations in good standing are eligible for student organization funding. The amount of funds that will be allocated to each organization on an annual basis will depend on:
  - a. Budget proposal (through the End of Semester Report), previous year's expenses/revenue, and projected expenses/revenue for the upcoming year
  - b. Group participation in CDM Club events and overall presence
  - c. Amount of funding the club receives from outside sources
2. All financial activity for your group that is not recorded by the CDM Club will not be considered in the following year's budgeting. It is also important that the CDM Club is notified of all events your group sponsors/co-sponsors, so that they can be taken into consideration when evaluating club budgets. You should never have any outside checking accounts for your organization – all funds should be within the Columbia University Finance System.
3. Status of the SGA overall budget will effect funding distribution among all CDM Club organizations. The CDM Club Leader will oversee the allocation of budgets to student clubs and will inform student leaders over the summer of their annual allocation.
  - a. Currently recognized and active CDM Clubs with completed End of Semester Report
    - i. Given a minimum budget from CDM Club of \$100/academic year for activities
    - ii. If your club receives significant income from outside sources, you may not be eligible for CDM Club funding
  - b. Currently recognized and active SIGs with completed End of Semester Report
    - i. Given a minimal budget from CDM Club of \$100/academic year for basic supplies/food for initial meeting
    - ii. Each group is responsible for maintaining relationship with its corresponding department for professional & financial support
  - c. If End of Semester Report is not submitted– see page 8 for requirements of club status
    - i. Active Status - the budget will be the same (as long as the overall budget allows for it)
    - ii. Inactive Status - no budget will be allocated

4. Any club/activity may request funding outside of their current CDM Club allotment for large-scale events.
  - a. The sponsoring groups need to submit an event proposal with budget proposal to the CDM Club at least one month prior to the event.
  - b. Priority is given to events being co-sponsored by two or more clubs/organizations.
  - c. Additional funds are always subject to availability

### Outside Revenue

Many clubs receive funding from outside sources such as on campus and off campus grants, membership dues, and professional organizations. All funds received must be deposited into the university financial account as overseen by the SGA.

1. Applying for funds and/or grants: Speak to the Director for Student Activities about these options.
  - a. President and Provost's Event Fund (P&P Fund): <http://uem.columbia.edu/student/pp-fund>
  - b. CU Arts: Gatsby Student Arts Support Fund: <http://artsinitiative.columbia.edu/campus/gatsby-student-arts-support-fund>
  - c. Kraft Family Fund Intercultural & Interfaith Awareness Fund: <http://ouc.columbia.edu/ouc-programs/>
  - d. Chaplain: Office of the University Chaplain Co-Sponsorship Fund: <http://ouc.columbia.edu/ouc-programs/>
  - e. Arnold P. Gold Foundation Grant for Student Initiated Projects: <http://humanism-in-medicine.org/>
2. Membership dues, advertising, contributions, donations, etc.
  - a. Any checks made out to Columbia University must be deposited into the University accounting system.
  - b. For departments wanting to give contributions, an internal transfer between departments can be completed. Please speak to the Director for Student Activities to process this.
3. Fundraising may be an option, but please speak to the Director for Student Activities to make sure you are following proper university development procedures. The CDM Alumni and Development Office may need to be involved in the process. Alumni are not to be contacted for donations unless approved by the CDM Alumni and Development Office.
4. Co-sponsorship – this is helpful for recruiting more people to the event and gaining additional funding. Speak to the Director in regards to contributing money or splitting up costs between multiple clubs/organizations. Options for co-sponsors include:
  - a. Other recognized CDM Clubs
  - b. Columbia University & CUMC departments/offices/student organizations

### Spending Policies

The following spending guidelines are in accordance with University policy regarding the amount of money spent on food and drinks per person for meetings, events, and special programs whether on or off campus. These guidelines are for all CDM Club organizations, special programs, class council, and campus events. This will help you spend your money more effectively throughout the year. Please see the following website for all official University Finance Information: <http://finance.columbia.edu/>. This site links to the official purchasing website: <http://finance.columbia.edu/procurement/purchasing>

As deemed appropriate by the CDM Club:

1. Meetings & Socials
  - a. Snacks, hors d'oeuvres/appetizers, including non-alcoholic drinks - \$3/person
  - b. With **prior approval** for alcoholic drinks – additional \$5-7/person
2. Regular Events
  - a. Lunch or dinner, including non-alcoholic drinks - \$7-10/person
  - b. With **prior approval** for alcoholic drinks – additional \$5-7/person
3. Special Events
  - a. SGA run events (Orientation, Super Night, etc) – follow guidelines as listed above
  - b. Transition Dinner - \$35/person, including all beverages
  - c. End of Year Banquets - \$35/person, including ONE alcoholic beverage (non-alcoholic beverages is unlimited in number, but can not exceed cap amount)

You are expected to adhere to the above guidelines. Any club that does not will also run the risk of not being reimbursed/paid for expenses and/or freezing of club budget. For reimbursements over \$1,000 you MUST speak to the Director for Student Activities before making the purchase, as it should be paid directly by the University and require additional bids to be able move forward on the purchase

### Methods of Payment

There is more than one way to have your expenses paid. Please keep in mind that whenever possible it is best for the University to cut a check directly to the vendor. Also, make sure your organization has enough funds to cover your spending, otherwise invoices and reimbursements will be denied. If receipts can NOT be found within 2 weeks of event please contact the club director as soon as possible.

1. **Tax Exempt Status-** You *must* use tax exempt forms for any purchases made on behalf of the CDM or any approved student clubs. Tax exempt forms are available at the Student Affairs office. Please be aware that the university cannot reimburse sales tax on any purchases made for programs and events. It is your responsibility to provide vendors with tax exempt forms as needed.
2. **Invoices-** This is the best method of payment, as the University will cut and send the vendor payment directly. It does not require anyone to put their own funds out in advance.
  - a. Contact the vendor and ask for an invoice made out to Columbia University with a unique invoice number, invoice date, and total amount due. Please make sure they include an email and/or phone number on the invoice so Columbia can contact them with any questions. Please see appendix for sample invoice to ensure it includes all the proper information. Keep in mind any vendors providing services require a Purchase Order, so please submit the paperwork to the Director for Student Activities as early as possible.
  - b. If we have not used this vendor before, please do not plan to do business with this vendor. Speak to the Director for Student Activities first, and you can discuss what your needs are for this particular vendor. If Columbia University has not worked with this vendor before, there

is additional work to be done before you can place the order. You must write something that explains why you need to use this vendor:

- i. You've compared prices and they are significantly lower (over \$1000 requires 1 additional bid, over \$5000 requires 2 additional bids)
  - ii. No other vendor in the Columbia financial system can provide this service. This is to ensure that there are no conflicts of interest in using this vendor. Using a pre-existing vendor is a much easier process.
  - iii. Get a copy of the vendor's W-9 form: <http://www.irs.gov/pub/irs-pdf/fw9.pdf> and hand it in with the invoice to the Director for Student Activities along with a contact phone number or email and make sure we know what name they are "doing business as".
  - iv. Once this is received by Vendor Maintenance, central processing will send the vendor an email with a link to fill out additional information. If they have questions, have them e-mail: [vendormaintenance@columbia.edu](mailto:vendormaintenance@columbia.edu)
  - v. Once this is approved, we are able to submit the invoice for payment.
- c. Submit the invoice and any other required paperwork as soon as possible to ensure a timely payment to the vendor. Please make sure the vendor knows we are tax exempt, and you can use the Student Affairs fax machine to send a vendor a tax exempt form. Again if the vendor is providing a service, we need the invoice as early as possible in order to ensure the Purchase Order is created to provide payment.
  - d. If you need to make a large purchase or need payment upon delivery/service, you need to plan ahead in order for the University to have time to cut a check. No club leader or club member should be expected to make large purchases and put out significant amounts of their own money, as it can be time consuming to get that individual reimbursed in a timely fashion. For pre-payment of event, submit invoice at least 4 to 6 weeks in advance. For payment upon service, submit invoice at least 3 weeks in advance. Also depending on the situation, it may require a Purchase Order from the university. Again this takes time to process, so please speak to the Director for Student Activities as far in advance as possible.
  - e. If you receive a contract with the invoice, please do not sign any contracts on behalf of your club. Explain to the vendor that as a student, you are not authorized to sign contracts. Submit the contract to the Student Affairs Office, so it can be reviewed by purchasing in advance.
  - f. Vendors can visit this website for information: <http://finance.columbia.edu/procurement/vendor-management> to update their business address and/or get in contact with Finance about their payment.
3. **Purchasing Card (Pcard)** - For pre-payment/payment upon service without an invoice, speak to the Director for Student Activities to use the CDM Club credit card. This is typically for small food deliveries, supplies, and online purchases.
- a. In order to use the Pcard, you must place the order with the Director for phone or online orders as the card cannot be given out. Please be aware that the Pcard cannot be used to purchase alcohol or rentals, and can only be used for food when events are on campus.
  - b. As a club leader, you are authorized to sign for the order and include an appropriate tip upon delivery for food. 10% is usually appropriate for tips on deliveries.
  - c. Return the itemized receipt within 24-48 hours after the event to the Director for Student Activities and confirm the number of people in attendance.

- d. For online orders, the Student Affairs Office already has existing tax exempt accounts set up with several vendors. Frequently vendors will not refund the tax unless the purchase is made through one of these office accounts.
4. **Individual Reimbursement** - If you have to put out some of your own money you can be reimbursed through the travel & business expense form.
  5. **Travel & Business Expense (TBE) Report/Reimbursement Form**
    - a. Once paperwork has been submitted, approved, signed and processed, a check for the reimbursement amount will be sent directly to the address listed on the form. The timeline can take up to 4-6 weeks for entire process to occur. Please contact Director if payment hasn't been received after a month.
    - b. Students/Staff must update their own address for reimbursements/payment. Visit
    - c. <http://finance.columbia.edu/procurement/vendor-management> to change remit-to-address for payments via check or to sign up for direct deposit. Please allow for several days to complete the validation process when submitting a request.
      - i. You should not use any personal funds and expect to be reimbursed for any services or speakers. They should be paid directly by the university.

#### Instructions for Reimbursement Paperwork

Small receipts must be taped onto 8 1/2 x 11" paper. Taped receipts should be in chronological order. All original receipt must be itemized (even for meals). Include supporting documentation: fliers, posters, conference itineraries, email advertisement, etc. If your reimbursement is for food, please indicate number of people in attendance of event and if less than ten, please list names. Always use a tax exempt form; otherwise you should contact the vendor to get tax refunded. Complete a description for each receipt, not just the name of the vendor. Provide evidence of the payment method (if it is not listed on the original receipt with the last four digits of the credit card) by submitting a copy of your credit card statement, which shows the funds have been withdrawn. Please do not staple the paperwork, just paperclip all pages together. If you lost or are missing a receipt, speak to the Director for Student Activities about the possibility of reimbursement for the associated expense.

#### Conference & Travel Guidelines

If your organization supports conference travel for your officers/members, please speak to the Director for Student Activities in advance to prepare for your travel. First you should confirm with the CDM Club or outside sources how much you have to spend/allocate for the conference. You should communicate to the CDM Club who your group is planning to send and how much each person should be reimbursed. As the leaders, you can determine how much you can afford to reimburse/pay per person. Typically transportation (air/bus/train/taxi), hotel, and conference registrations are covered. You do not have to cover all costs for each conference attendee if you cannot afford to do so.

As you must submit requests for reimbursement *within 30 days* from the date of the expense, you don't need to wait until the conference is completed to turn in your all paperwork. Please coordinate with the Director of



Student Activities to turn in your reimbursement paperwork via mail, fax, or email, if you are away from campus.

The points below are a summary, so please see the following site for the official University Travel policy:

<http://finance.columbia.edu/content/roles-and-responsibilities>

- a. Transportation costs (airfare, bus, train) - You must pay your own transportation up front and wait to be reimbursed. However, you can turn the reimbursement paperwork in *prior to travel*. For example, as soon as you book a flight, you can submit your form, receipts, and conference information for reimbursement. You don't have to wait until after the conference.
- b. Please see the Director of Student Activities in advance for conference registration payment as this can be usually paid with the CDM Club purchasing card. If you are unable to use the Pcard with the Director and you pay on your own, you can submit this *prior to travel*.
- c. Any reimbursements for hotel charges must be turned in *post-travel* as you are not billed in advance for this (this includes hotel reservations made through online sites that charge you in advance). You cannot be reimbursed for hotel charges until the stay is completed. Upon your return, you can submit your paid bill and credit card statement with a reimbursement form.
- d. All conference travel reimbursement *must* include a copy of the conference agenda (proof of date, location, and affiliated organization), associated receipts, and print outs of credit card statements as needed.

## EVENT PLANNING

The CDM Club Office is available for assistance in planning all club and organization events. Please make sure to communicate your upcoming events to prevent date conflicts. Always plan ahead in order to ensure your event is a success. Use the information below to lead you through the process of planning an event. It is important for your club status to keep the CDM Club aware of what your club is doing throughout the year.

In order to have an event on campus, a student organization must be a recognized by the CDM Club. The CDM Club assumes NO responsibility or liability for activities conducted by student organizations off-campus, which are not officially sanctioned by the university. You should never use the Columbia University name to reserve any off campus events that are not sanctioned by the CDM Club. Club leaders are responsible and required to inform their advisor (Director of Student Activities) regarding all meetings, programs and events.

1. **\*\*MANDATORY\*\*** For all large-scale events (50+ people) meet with the Director *at least* one month in advance to begin planning and budgeting accurately for your event and to ensure all the proper paperwork has been completed.
2. For smaller events and meetings, meet with the Director at least the week before, as needed. This allows the event to be properly advertised, to order food, etc.
3. Speak to the Director of Student Activities regarding policies for having outdoor/roof events on campus. The CUMC Office of Housing only sanctions events on the roof between Memorial Day and Labor Day, and using any other outdoor space should be approved through their office- see the ***Reserving Space on Campus*** section on the next page.

4. For events in Bard, security should be aware of the number of people attending, who is the responsible party at the event, if cash is being collected, who collects it, and where it is stored. If you plan to have an event in Bard with outside guests invited, additional security is required at a cost to your group. Security will also require the names of any vendors that will be attending your event (this includes DJs, bands, etc.)

5. If you are thinking about having alcohol at your event, please speak to Director of Student Activities immediately. Your first step is to gain authorization from the Director of Student Activities to serve alcohol at your event *prior* to advertising the event. Please see the **Alcohol Policy** section of CDM Student Policies at: <http://dental.columbia.edu/page/policy-alcohol>

In addition to following the policies, you **MUST** have one person at each event that is trained in Social Host Alcohol Training (SoHo) with AIMS in Student Wellness. CDM, as part of the larger CUMC community will not promote or encourage excessive alcohol or drinking events.

6. CDM Club has a storage closet in Bard Basement that can be used for keeping supplies. You are also able to use the CDM Club Office to store small items, make copies, and prepare for your events. Speak to the Director about these options.

7. If you'd like to advertise on the televisions in Hammer and CDM, it is free for student groups and you need to email Ed Basch ([erb2128@columbia.edu](mailto:erb2128@columbia.edu)) for posting information. For advertising on the TVs in the Towers, please email Tanya Kent James ([tk2375@columbia.edu](mailto:tk2375@columbia.edu)). Please make sure to specify that you are an official student group through the CDM Club.

8. For events in Alumni- if you plan on using lighting, AV, sound, you *must* set up a meeting with Jonathan Kornberg ([jk3220@columbia.edu](mailto:jk3220@columbia.edu)) to discuss and get instruction on the proper usage of the AV equipment and moving the podium. You may need to hire a technician depending on the type of event you are having. This is the only way you can gain access to the key to unlock the sound booth and other things you might need to run your event. Jonathan is available for all questions.

9. If you reserve space through R25 and decide not to use it, please contact Ed Basch ([erb2128@columbia.edu](mailto:erb2128@columbia.edu)) to cancel the reservation. CDM gets charged for overall room usage, so we want to try to keep the costs to a minimum.

10. Put your invoice for rentals in early- some vendors require pre-payment or a purchase order (always for services). These things take time, so you should submit at least a month prior to delivery.

### Reserving Space on Campus

You must be a current recognized student group by the CDM Club to reserve space on campus, and can only reserve rooms for official CDM Club events. If you are having trouble reserving a room, speak to the Director.

1. *Alumni Auditorium, Russ Berrie Conference Room, Hammer Health Science Center Classrooms:*

a. *Each club has a login and password for their group to make reservations through the Resource 25 system. Leaders can be trained on how to use this by registering for a class:*

<http://cumc.columbia.edu/it/cts/r25.html>

b. *Please make sure to use CDM Student as main designator for tracking purposes.*

c. *Editing and cancelling reservations, please email Ed Basch ([erb2128@columbia.edu](mailto:erb2128@columbia.edu)).*

2. *Bard Hall – Basement, Roof, Courtyard:*

- a. *Must fill out form with the CUMC Office of Housing Office in Bard Hall*
- b. *As per Housing Policy, reserving space for outdoor events in Bard Hall/Towers is not available from October 1 through May 31. Speak to the Director of Student Activities if you have any questions.*
- c. *For use of the Bard Hall 1st Floor Lounge, please speak to the Director of Student Activities first. Use of the Bard Hall 1st Floor Lounge tends to be limited to special events, and the Hudson View Room/Recovery Room is a quiet study space.*

3. *Off-Campus Events:* Speak to the Director of Student Activities to discuss your plan before committing to a vendor.

- a. CDM rarely authorizes officially sanctioned events off campus at bars/restaurants/lounges. We recommend that you plan these events as individuals and do not use the university name in reserving any space.
- b. Official CDM Club events with alcohol cannot take place in private residences. Private residence parties cannot use the Columbia University name, cannot use CDM Club money, and cannot be advertised through university means. Also, no money can be collected at these events to support CDM clubs, otherwise it becomes subject to Columbia policies and procedures. If money is collected in support of an outside charity, it should be handled personally and not with CDM Club.
- c. If the CDM Club has authorized an off campus event, you should not sign any contracts on behalf of the University as you are not authorized to do so. Speak to the Director of Student Activities in advance for assistance.
- d. *Facilities Requirements:* A facilities request needs to be submitted as early as possible to make sure the appropriate equipment will be available.
  - a. *Classroom spaces:* Most spaces have the basics- computer, podium, laptop connection, overhead projector, microphones. If you need anything beyond that please discuss this with the Student Affairs Office and possibly speak to Jonathan Kornberg ([jk3220@columbia.edu](mailto:jk3220@columbia.edu)), especially for Alumni Auditorium. If you require additional chairs/tables or a porter for large day long events, this will be at an additional cost charged by CUMC Facilities.
  - b. *Bard Hall spaces:* Visit the CUMC Office of Housing Services to submit a room reservation form and a floor plan set-up sheet. Please speak to the Director of Student Activities first before requesting to use the Bard Hall Lounge as there may be significant charges for set up/take down your club would be responsible for. Also you are responsible for cleaning up after your own events anywhere on campus. If you plan to use AV in Bard, CUMC AV does not service this space and you would need to hire out an outside vendor at an additional cost.

*Security:* If there are a significant number of non-Columbia guests attending your event (especially in Bard), you may be required to hire additional security (at an additional cost to your organization). For events on weekends or when expecting large number of guests, please let Public Safety know ahead of time how many, when, and where- so they can be prepared.

## LUNCH AND LEARNS

CDM Clubs are not allowed to hold Lunch and Learns without first completing the required form which must be approved by the club's faculty mentor and submitted to the Student Affairs office two weeks prior to the event. If you have questions about the affiliation of a planned speaker, please contact the Office of Student Affairs for verification and consult. The CUMC Conflict Of Interest Policy can be found at:

<https://www1.columbia.edu/sec/cu/hs/sdos/>

## CAMPUS RESOURCES

*CUArts and Ticket Information Center:* If you want to reach a larger audience of the Columbia community or want to sell tickets, another option is contacting the CU Arts to publicize (<http://cuarts.com/>) or sell tickets through the TIC (<http://artsinitiative.columbia.edu/events/submit-student-event>). Rudy Scala is the TIC contact person [ras2187@columbia.edu](mailto:ras2187@columbia.edu).

*Office of Government and Community Affairs:* If the community is involved in your project (<http://www.cumc.columbia.edu/dept/gc/index.html>).

*Alumni Affairs:* If you want to connect with alumni (another resource to use and think about) (<http://www.psalumni.cumc.columbia.edu/>).

*Audio Visual:* If you have any questions or issues regarding AV room reservation and facilities, contact 5-Help or email: [5help@columbia.edu](mailto:5help@columbia.edu). This does not include Bard Hall, which requires an outside vendor.

*Campus Security and Crime Prevention-* Black Building, 1st floor, Room 109

Non Emergency Phone: 212-305-8100

Emergency Phone: 212-305-7979

Bard Hall Security: 212-304-7018

*Center for Student Wellness-* 50 Haven Avenue, 107 Bard Hall

212-304-5564 , [studentwellness@columbia.edu](mailto:studentwellness@columbia.edu)

<http://cumc.columbia.edu/students/wellness/>

*CUMC Office of Housing Services-* 50 Haven Ave, 1st floor

212-305-4357, [housing@cumc.columbia.edu](mailto:housing@cumc.columbia.edu)

<http://cumc-housing.columbia.edu/>

*CDM Club-*

<http://www.cdmsga.com/>

*Student Health Service/Mental Health at CUMC- 60 Haven Avenue - Lobby Level*

212-305-3400

<http://cumc.columbia.edu/student/health/>

*Updated: 8/29/2015*