

WILLIAM & MARY
LAW SCHOOL

RECOGNIZED STUDENT ORGANIZATION

HANDBOOK

2017-2018



WILLIAM & MARY
LAW SCHOOL

Associate Dean, Administration
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Dear Law School Student Leaders:

Student organizations provide a valuable service to the Law School community by promoting leadership development, community spirit, activism, public service, and social and cultural interaction. Each year, numerous events are sponsored by the Law School's student organizations. For many of these events, law students orchestrate opportunities to meet and interact with local, state and nationally renowned individuals - experts in their field. With other events, student organizations promote and demonstrate altruism and dedication to the greater good. In other words, the citizen lawyer qualities on which this law school was founded.

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This Student Organization Handbook provides information that can assist organizations to reach their goals. While some of the information presented comes from various University and Law School materials, this manual is not intended to replace official University publications regarding student activities. Rather, it is to supplement these documents and guide the organization through a successful academic year.

I extend my sincere congratulations to our students for their fine tradition of excellent leadership. I wish you success in the coming year. Do not hesitate to contact me if I can be of any assistance.

With kind regards,

Liz Jackson

Lizbeth A.S. Jackson
Associate Dean, Administration

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Useful Contacts

Inside the Law School

Davison Douglas dmdoug@wm.edu 221-3790
DEAN AND PROFESSOR

Seek his counsel on concepts and ideas. Seek his participation in events.

Cassi Fritzius cbfrit@wm.edu 221-3790
DEAN'S EXECUTIVE ASSISTANT

Seek her advice on planning successful events. Contact her if wishing the Dean or Vice Dean to attend the event.

Patty Roberts perobe@wm.edu 221-3821
VICE DEAN AND PROFESSOR

Seek her participation in events. Seek her guidance regarding advisors for the organization. Seek her counsel on any issue relating to the organization, students, faculty and the Law School.

Liz Jackson lajac1@wm.edu 221-3782
ASSOCIATE DEAN, ADMINISTRATION

Seek her counsel on any issue relating to the organization. Seek her approval for events.

Blake Willis bawillis@email.wm.edu
PRESIDENT, STUDENT BAR ASSOCIATION

Anthony Onuoha akonuoha@email.wm.edu
TREASURER, STUDENT BAR ASSOCIATION

Kevin McCandlish kbmccandlish@email.wm.edu
SECRETARY, STUDENT BAR ASSOCIATION

Seek the President's assistance for general questions and concerns about any aspect of student government. Seek the Treasurer's assistance for approval of club budgets and supplemental funds offered throughout the year. Seek the secretary's assistance for use of the student activity bulletin boards or for information on the bi-weekly SBA listserv.

Matt Rouette marouette@wm.edu 221-1596
IT SUPPORT ENGINEER

Robert Jordan rhjordan01@wm.edu 221-7507

Seek their assistance with setting-up web pages on the Law School site. Time permitting, they may be able to assist with minor computer problems.

Whit Weidner wwweidner@wm.edu 221-2180
Seek his assistance with A/V set-up for conferences, lectures, symposia.

Mike Ende mjende@wm.edu 221-3811
ASSOCIATE DEAN, CAREER SERVICES
Seek OCS assistance when planning programs that involve guest speakers who address job search and career-related topics. OCS will provide guidance and advice on how to identify and invite speakers and develop discussion/talking points for career-related programs. OCS can also help promote certain events to increase student attendance.

Laura Beach lwbeac@wm.edu 221-3798
INTERIM ASSOCIATE DEAN, ALUMNI AFFAIRS & DEVELOPMENT
Seek her assistance with co-sponsoring related events. Seek her advice and capture information regarding including alumni in events as speakers or guests.

Terri Lorincz ttlori@wm.edu 221-1489
CFO AND W&M LAW FOUNDATION CONTROLLER
Seek the assistance of Terri, Lou, Kathy or Jessica regarding any financial aspect of your organization. All student organization leaders should visit with the Accounting Office early in the year as they develop organization budgets and make plans for sponsored activities. Seek their counsel well in advance of any event your organization is planning.

Lou Pulley lbpul2@wm.edu 221-1485
Kathy Patrie kjpatrie@wm.edu 221-7818
Jessica Pierson jkpierson@wm.edu 221-7405

Seek any member of the office for assistance in advance of making purchases, ordering food, making plane reservations and rules related to booking hotel rooms. Ask a member of the office questions regarding travel reimbursements, travel regulations, and department reports and budget questions. In other words, these ladies are your first stop before making expenditures.

Faye Shealy ffshea@wm.edu 221-3784
ASSOCIATE DEAN, ADMISSION
Seek her advice should your organization be able to assist the admission process by making calls to admitted students, providing information suitable for applicant contact, or in other ways assist with bringing in future classes of students.

Gloria Todd gjtodd@wm.edu 221-1423

OFFICE MANAGER

Seek her assistance in reserving rooms, scheduling events, or purchasing equipment or supplies. Seek her assistance with ordering furniture deliveries and set-up for events. Seek her assistance with arranging housing for guest speakers.

Jaime Welch-Donahue jpwelc@wm.edu 221-1840

COMMUNICATIONS DIRECTOR

Seek her guidance on how to advertise your events.

Outside the Law School

Anne Arseneau aharse@wm.edu 221-3300

DIRECTOR, STUDENT LEADERSHIP DEVELOPMENT

Jennifer Leung jaleung@wm.edu 221-3300

ASSOCIATE DIRECTOR, STUDENT LEADERSHIP DEVELOPMENT

Seek their counsel on registering the organization with the university, working-up a budget, issues with serving alcohol at events (TIPS training), use of University facilities for events, and related topics. The Student Leadership Development web page (<http://www.wm.edu/leadership>) is a resource for University policies and other helpful information.

Kerstin Losee llosee@wm.edu 221-3702

CATERING SALES COORDINATOR, DINING SERVICES

Seek her advice on menus and dining services for dinners, luncheons, brunch, breakfast or coffee breaks. Seek her counsel in building a catering budget.

Julie Davenport jmdavenport@wm.edu 221-3275

STUDENT ORGANIZATIONS SUPPORT SPECIALIST

Seek information from her or on the web

<http://www.wm.edu/offices/studentleadershipdevelopment/scheduling/index.php> regarding use of other campus facilities for your event.

Eden Harris erharris@wm.edu 221-4821

ASSOCIATE DIRECTOR, MARKETING, AUXILIARY SERVICES

Seek her for information on using the College or Law School name or logo.

Technology Support
Jones Hall Room 7

support@wm.edu

221-HELP

Seek the help of this office for assistance with accounts, software, printing, scanning, computers and removable media.

Student Organizations

The Student Bar Association

The Student Bar Association (SBA) is the student government of the Law School. It is comprised of 4 elected officers (President, Vice President, Secretary, and Treasurer), 2 elected representatives from each of the 2L and 3L classes, 3 elected representatives from the 1L class, and 1 elected representative from the LLM class. In addition, the President appoints students to serve in various positions, including Honor Council Justices, Student Assembly Senators, Graduate Council representatives, American Bar Association representative, Webmaster, Community Service Chair, and the Graduation Committee. The President also appoints students to serve on a number of campus-wide committees. Elections for the officer positions and upper-level representatives occur annually in February. Elections for the 1L and LLM representatives occur annually in September. SBA meetings are held weekly and are open to all students.

The SBA distributes a bi-weekly email listing upcoming events and important announcements. Any member of the law school community may submit an announcement by going to <https://digests.wm.edu/lawschoolcommunity/> and entering their William & Mary ID and password. Announcements go out on Sunday and Wednesday evenings and must be received by 9PM. SBA organized events include Thursday night Bar Reviews, a fall semi-formal, Barrister's Ball (Spring formal), organized outings in fall and spring (such as a softball tournament, wine trip, and ski trip), faculty/student mixers, a student mentor program, 1L and admitted applicant activity fairs, and a variety of community service opportunities.

The SBA oversees all recognized student organizations and is the conduit for organization budgets and request of funds. The SBA also operates as the liaison between the students and the faculty, staff and administration.

A current Recognized Student Organization list will be distributed at the mandatory meeting.

Forming a Recognized Student Organization (RSO)

Section II C of the Student Rights and Responsibilities (*Student Handbook*) states that students have a right to create groups that serve legitimate interests. Law students desiring to create an organization to promote or study a particular interest as a group of students, must register with the Law School Administration. Some organizations may be topical only for a specified period of time (such as those promoting a particular presidential candidate). These organizations may not wish official recognition from the SBA or University; however, all student organizations should be registered with the Law School Administration.

Becoming a RSO

This is as simple as completing the Student Organization Registration Form (see Appendix or contact Gloria Todd). Forms are due upon the formation of an organization and thereafter each spring following the election of new officers. Registration of an organization does not constitute sponsorship by the Law School or University. Only organizations that are officially sponsored by the Law School may use the University name in its publications or on its letterhead.

How to Register with the SBA and the Office of Student Leadership Development

This is as simple as providing the SBA president with the organization name and leaders' names along with copy of the organization constitution and by-laws. A sample constitution can be found on the Office of Student Leadership Development [website](#).

It is in the interest of the RSO to hold elections early in the spring. This will allow for a smooth transition from the out-going board to the in-coming board. A mandatory meeting for all RSO presidents (or chairs) and treasurers is held in the fall semester. Additional mandatory meetings may be called as needed.

Faculty Advisors

Organizations are not required to have faculty advisors. However, it may be beneficial to the organization to seek guidance and/or assistance from a faculty member. The advisor can be a good resource for Law School or University policy, potential external speakers for meetings or events, possible activities that would promote the purpose of the organization, institutional memory and continuity for the organization. An advisor can assist the RSO to achieve the purpose and goals for which it was organized.

Finding an Advisor

There is no formal way to obtain an advisor. The best method is to seek a professor with an interest in the topic area of the organization. See Dean Jackson for suggested professor names if in doubt. Final approval of the advisor must be granted by the Vice Dean's Office. This is to ensure equity among faculty assignments.

Responsibilities of Advisor

- ❖ Advisors may choose to attend or be invited to attend organization meetings and/or events.
- ❖ Advisors should be informed of planned activities and their status.
- ❖ Advisors should be consulted on issues of policy and procedure. In particular, they should be advised of looming issues and consulted on possible solutions.

Benefits of Being a RSO

- ❖ Storage space within and access to the Student Activity Center.
- ❖ Ability to reserve space within the Law School or University for meetings and/or events.
- ❖ Ability to have web presence on Law School web site and link to organization web pages.
- ❖ TribeLink site for your organization
- ❖ Recognition in Law School publications.
- ❖ Registering with the SBA will allow the student organization, if available, bulletin board space in halls near Room 124 and SBA office.
- ❖ Registering with the SBA allows the organization to apply for funding through SBA. The SBA will review the application, provide funding and/or send the application forward to the University Student Activity Office for funding. If necessary, the SBA will petition the Law School Administration for additional funds. Becoming an RSO does not guarantee that an organization will receive SBA funding.

Maintaining Student Organization Registration

Student leaders are asked annually to report the new slate of officers to Ms. Todd. At this time, RSOs should note any change to their constitution or bylaws to the SBA. Student Leadership Development conducts an Annual Renewal process that all Recognized Student Organizations must complete at the end of the Spring semester.

Through this process, organizations will update information such as the officer roster, primary contact, and upload a current copy of the constitution/by-laws.

Using the College Name

RSOs may use the College name or logo only after obtaining a written license. See the [Licensing & Trademark Administration](#) for more information.

Student Activity Center

All RSOs are entitled access to the Law School Student Activity Center. The Center is used for organization storage space. As shared space, RSOs are expected to maintain the security of the Center and keep it in good order. Do not store food. Do not store items that are no longer of use to your organization.

Phones

Phone lines are restricted to authorized RSOs only. Should an RSO require a phone to conduct business, a written request must be made that justifies the need. This request must come from a RSO leader and is to be submitted to Dean Jackson. RSOs with phone privileges are responsible for the line, voice mail and long distances charges. It is not permitted to make personal long distance calls on University phone lines without the proper authorization code. You may obtain a long distance authorization code by completing the requisite [application](#). Difficulties with the line and/or phone should be directed to Ms. Todd.

RSO Email Accounts

RSOs may have a University sponsored email address. Organization User IDs are provided through the Office of Student Leadership Development upon the organization's recognition by that office. RSO email accounts should be checked daily.

Student Organization Fairs

Several student organization fairs are coordinated by the SBA. These fairs help familiarize students and potential students with the various extra-curricular opportunities available at the Law School. The fairs occur during the Admitted Applicant Event in late spring as well as at the conclusion of the first week of school for the entering students.

Web Pages

All RSOs are encouraged to create a website. Cascade is the University's content management system. Using Cascade allows sites to be created within the Law School's

main website, maintaining formatting and styles. Cascade also aids in continuity in transferring duties from one year to another as the Law School is able to admin the site access (not possible with outside web hosting solutions). All RSOs must create a web presence on TribeLink. Each RSO automatically receives a TribeLink site as a recognized student organization. You can use this site as a simple and easy to manage website for your organization's information. If you need increased functionality, you are certainly welcome to [explore additional options](#), like Cascade or WordPress. Please note that the directory of Law School student organizations links directly to your organization's TribeLink page, so be sure to keep that updated.

Websites are a great way to keep your members informed about events and other news, publicize your activities to alumni and others, and attract prospective students to the Law School. But this only works if you keep the site updated, and the best way to do that is to designate an officer or other member with responsibility for the website. The Law School maintains a list of links to RSO websites on our [website](#), but it will not include any RSO website that appears to be outdated. Those RSO sites will be taken down from the Law School web page altogether.

Computers

Law School computer support for RSOs is minimal. With some exceptions (those RSOs that have an academic or credit-earning component) computers are not supplied nor supported by Law School IT. Time permitting, Law School IT will support student or RSO purchased computers. The primary Tech support for law students is provided by the William & Mary Technology Support Center ("TSC"). The TSC commits to being available to support students during normal office hours and can be reached by phone at 221-4357 (221-HELP) or by email at support@wm.edu.

Mail and Express Mail

US Mail

RSOs must pay for their own postage. RSOs wishing to use the University mail service, must seek permission and the appropriate code from Kathy Patrie. When doing a large mailing, RSOs must adhere to the US Postal Service regulations. These regulations may be obtained from the Campus Post Office. Bulk rate will be applied to large mailings. All large mailings should be clearly marked with the appropriate code and logged on the appropriate form in the mail room. (If soliciting for donations, please see "[Contacting Individuals, Agencies or Alumni](#)" for further instructions.)

Express Mail

The Law School Administration developed express mail procedures to improve efficiency, eliminate billing confusion and minimize expense. RSOs should consider email or fax to communicate whenever possible instead of using express mail services. If using express mail, RSOs should seek advance permission. When that is absolutely not possible, reimbursement may be allowed.

Seeking advance permission

Other than journal members, any individual or representative of a RSO requiring the use of express mail services must seek approval from Accounting prior to using a Law School account. Journal members must seek approval from Denise Ward or Jan Abbott. At receipt of invoice, the Law School Accounting Office will charge the applicable flow-thru account or operating fund for this expense.

Seeking reimbursement

When prior approval is not possible, the individual using the express mail service will assume the cost of the mailing and then submit an original receipt to the appropriate office for reimbursement (i.e., Law Review staff to the Law Review; other journal staff to Jan Abbott; representatives from RSOs to their RSO Treasurer).

Printing and Photocopying Services

RSOs may use any printing service they choose provided the service complies with the State guidelines. Primarily, we are required to conduct business through agencies registered with the State of Virginia. A specific purchase order must be created based on estimated cost. Please contact Law School Accounting for information. A listing of approved agencies is found on the [State web page](#).

The University Copy Center is located in Swem Library. This office will copy, print, finish and/or bind your documents. Use of this agency does not require a purchase order.

Purchasing

*As a general note, please remember that when seeking reimbursement, the Law School can reimburse an individual. **The Law School cannot reimburse an organization's check book.** However, the University requires the use of the University's credit cards for most purchases. See Accounting before making any purchase and inquire if there is a card that can be used.*

Supplies

RSOs are responsible for acquiring their organization supplies. Purchases should be approved through the appropriate RSO representative and then through Gloria Todd.

Equipment

RSOs with office space generally have some furniture and equipment provided by the Law School. If any Law School provided furniture or equipment needs maintenance, contact Ms. Todd with the exact nature of the problem and location of the defective item. Items not provided by the Law School are to be maintained at the RSO expense. Please contact Ms. Todd, who may be able to arrange for the repair. This repair will be charged to the RSO.

If additional equipment is desired, please contact Dean Jackson with the exact nature of the need, cost of item(s) and rationale for the Law School to provide the item.

Reserving the Law School Facility

RSOs can reserve any available space within the Law School. This includes class rooms, meeting rooms, Zime Cafe, lobby, and patio areas.

To reserve any space within the Law School, please contact Gloria Todd via email with the specifics of your event. You must provide the email and name of the contact person for the event, name of the event, date(s), time(s), and preferred rooms. You must request the doors be unlocked if out of normal School hours. You should include a description of the event. Reservations must be made in advance of advertising an event. Reservations will be confirmed by Ms. Todd. The reservation serves as the source for the information that will be displayed on the Law School Master Calendar - so include a description that will both advertise and explain the event and who is invited to attend.

When planning a meeting or event, first check the Law School Master Calendar on MyLaw. Look to avoid creating a conflict between your event and other scheduled events. In particular, RSOs should avoid scheduling events that cause those with an interest in your meeting or event to choose between activities. All room reservations will be confirmed through the Associate Dean for Administration. It is possible the request will be denied if the Associate Dean deems it to conflict significantly with other scheduled events.

If a meeting or event is cancelled, please contact Ms. Todd immediately. She will remove the event from the Law School Master Calendar to avoid confusion. See “Events” for more information regarding use of facility and planning events. (See Appendix for list of rooms and approximate capacity.)

Budgets

All student organizations are expected to be self-supporting either by membership dues, funds raised through various activities, or successful application to the SBA. Limited funds are available to assist the RSO in becoming established or to aid the RSO in meeting their organizational objectives.

Building Budgets

All RSOs are expected to build a comprehensive annual budget. In addition, detailed budgets should be created for each event sponsored by the RSO. Jessica Pierson is a helpful resource if assistance in building a budget is needed.

Requesting Funding

Funding Sources

RSO funding may come from a variety of sources: RSO earned, such as membership dues, annual donations and fund raisers; the Student Assembly; the SBA; or the Law School. When presenting their annual budget, a RSO should demonstrate that RSO-earned funds will appropriately be used and requested funds will serve as a supplement. The SBA will work with the RSO to access funding from other sources.

Presenting Budgets

The SBA receives 50% of the student activities fees that law school students pay as part of our tuition. The SBA allocates these funds to the RSOs at the law school. In order to complete this task effectively, RSOs will be required to submit a detailed budget application to the SBA Treasurer detailing the RSO's expected events and corresponding financial need for the following academic year. A call for budgets will come through the SBA Treasurer in April with results to be published at the beginning of the next academic year. Late submission may negatively impact a RSO's budget. Generally, not all events can be funded through the SBA funding mechanism. Therefore, RSOs will rank anticipated events by order of importance to your organization. The Treasurer and Finance Chairperson will provide additional information, counseling and general direction to all RSOs. The SBA Treasurer will work in consultation with the SBA Board and Finance Chairperson to review the requests and allocate funds accordingly.

The goal of the SBA is, at a minimum, to support events that historically have been important to the Law School community. Funding requests will not be considered for an

RSO that did not submit a budget. Most activities are known in advance and prior budgeting facilitates the allocation of funds throughout the year. Failure to submit a budget will make it unlikely that expenses will be paid on top of the budget apportioned to your organization at the start of the year. In this scenario, all additional monies will have to come out of the allotted funding provided to the particular organization(s).

The following criteria will be considered when allocating funds:

- a. The extent to which the proposed activity is likely to foster growth and excellence among students at the College.
- b. The commitment of the RSO to the execution of the activity.
- c. The history of the activity and its projected needs for the upcoming fiscal year.
- d. The stated plans, proposals, and goals of the RSO's primary activities.
- e. Any other relevant factors the SBA deems appropriate including: the number of students impacted by the organization; value and/or utility to the law school community; price; uniqueness of a given project or event; and the size of the event.

Unanticipated Funding Needs

From time-to-time, organizations seek additional funding for unanticipated events or as a result of exceeding their budget. These funding requests also must go to the SBA Treasurer. When approved, the SBA will pursue additional funding for the RSO. Under NO circumstance should the RSO approach the Law School or University Administration to request supplemental funds. This policy ensures equitable distribution of funds; minimizes duplicate and confusing contacts of administrators; and uses the strength, established relationships and training of the SBA to negotiate as appropriate. Supplemental funding is not guaranteed. Please be fiscally responsible, monitor the organization spending and honor your established budget.

Unfunded Activities

RSOs that did not receive funding for a requested event or did not receive funding due to a failure to submit the budget forms by the stated due date may submit a written appeal to the SBA through the designated appeal process. Appeals will go before the SBA Board for a final binding decision.

Activities that Qualify for Funding

Each year the law school will receive 50% of the student activities fee that law school students pay as a part of our tuition. Out of this 50%, the SBA typically funds the following:

1. Student Government Activities, to include the SBA and Honor Council.
2. RSO events, pursuant to approved budget requests.

In addition to the student fees, law school students will also have access to additional university funding opportunities, including:

1. Conference Activities, to support student participation at conferences, lectures, or symposia. For information on applications and deadlines: <http://www.wm.edu/offices/studentleadershipdevelopment/funding/index.php>
2. Special Activity Funding, to support RSO sponsored activity or event. These funds come from four areas: Speakers Fund, Multicultural Fund, Campus Event Fund and the New Event/Initiative Fund. For information on application guidelines is found under [Student Leadership Development](#).

Law school students should consult with the SBA Treasurer prior to submitting additional funding requests for assistance in the preparation of successful requests.

When considering these additional funding requests, the university will continue to look favorably upon the following types of activities:

1. Service Activities, supporting volunteer service to the college or community.
2. Co-curricular Activities, these must clearly be linked to the University or Law School but cannot be linked to an activity for which academic credit is received.
3. Cultural Activities, to include programs designed to increase cultural awareness and must benefit the entire college community.
4. Interscholastic Activities, supporting competitions, exchange of ideas or simulations with students of other institutions of higher education.
5. Peer and Public Education Activities, to support the promotion of knowledge and information on subjects that are not politically partisan or involve religious worship or devotional activities.
6. Humanitarian Activities, to support student action to promote or encourage the humane treatment of people or animals.

Law school publications will continue to be funded through the Media Council. These publications currently include, *William and Mary Bill of Rights Journal*, *William and*

Mary Business Law Review, William and Mary Journal of Women and the Law, William and Mary Environmental Law and Policy Review, and Not Wythe-Standing the News.

Requesting Reimbursement

*As a general note, please remember that when seeking reimbursement, the Law School can reimburse individuals. **The Law School cannot reimburse an organization's check book.***

To receive funding approval prior to an event, submit the Funding Request and Reimbursement Form (see SBA Office) to the SBA Office **30 days prior to the event.**
NO EXCEPTIONS

The College and Law School **do not reimburse** state sales and use tax with certain exceptions. If you make a purchase that is not included in the following “exceptions” list, any applied taxes may not be reimbursed.

- Occupancy taxes on hotel/motel lodging.
- Out-of-State purchases.

Any funding requests submitted after the stated 15-day deadline will not be reimbursed until, at the earliest, three weeks after the event. Original receipts not submitted by graduation will not be reimbursed. **NO EXCEPTIONS**

No funds will be dispersed without original receipts. State regulations prohibit the prepayment of most expenses. See Jessica Pierson at least 15 days before you need a check, should elements of your event require a deposit (e.g., renting a banquet hall) or require payment to vendor immediately at the conclusion of the event (e.g., entertainment expenses). All requests for reimbursement must be submitted within 15 days of the event. ALL requests for funding or reimbursements must be directed to the SBA Treasurer, who is your liaison to the Dean, the Accounting Office and most importantly, your funds.

Reimbursement requests require:

- ◆ SBA Funding & Reimbursement Form approved by an authorized RSO officer. The approving officer must be different from the person requesting reimbursement.
- ◆ Name, full address and W&M ID Number (the 930-number) of individual to be reimbursed (not a third party and not an RSO).
- ◆ Name of event and date.

- ◆ Itemized original receipt (credit card receipt does NOT substitute) and proof of payment receipt (if separate from itemized receipt).
- ◆ A photocopy or scan of the credit card used to make the purchase (black out all but the last four digits of your credit card number on the photocopy)
- ◆ If reimbursement is for a meal, a list of all participants must be included.

There are **NO EXCEPTIONS** to the reimbursement request requirements.

In emergency funding scenarios, please see the SBA Treasurer regarding ways to expedite the process. There are no promises that such a scenario will necessarily be successful, but it is in your best interest to keep the lines of communication open with your SBA. Please keep in mind that financial decisions are not made at the discretion of the SBA. State rules and regulations must be followed. Emergency funding under these regulations is unlikely.

For the purposes of financing and budgeting, food over allowed State per diem amounts CANNOT be reimbursed from State funds. Alcohol CANNOT be reimbursed from State funds either. These items must be on separate receipts to receive reimbursement, if applicable. Always confirm reimbursement guidelines prior to spending funds.

Maintain Good Accounting Principles

RSO treasurers are responsible for keeping up-to-date records of expenditures and deposits. Jessica Pierson can assist RSOs in building budgets, provide budget examples, provide a budget history for the RSO (if available), and assist in guiding RSO leaders in accurate bookkeeping. From October to May, mid-monthly statements will be placed in the RSO hanging file. These statements will reflect cumulative spending to prior month-end.

Fundraising

Planning a Fundraising Event

Many RSOs hold fund raisers throughout the year. It is important, for a successful event, to consider:

- ➔ PSF (Public Service Fund) routinely sells many items. Please check the PSF inventory to avoid duplication of items to be sold and thus reduce the potential income for either organization.

- The University or Law School name and the University logos may not be used without expressed permission (see information under “Becoming a RSO”).
- Check the Law School Master Calendar before selecting a fundraising date.
- As far in advance as possible, reserve room/patio/lobby space and provide information about the event to Gloria Todd. Ms. Todd will send the request to the Associate Dean for Administration for approval and ensure this information is displayed on the Master Calendar.

Contacting Individuals, Agencies or Alumni

Organizations holding a fund raiser that solicits individuals or agencies outside the Law School must contact the Associate Dean for Alumni Affairs/Development. In this manner, we can be assured that your efforts will not create a conflict with and could be supported by the Law School Development Office. In addition, the professionals in this office may assist your organization by providing tips for a successful fundraising event and/or suggest ways to include alumni and so benefit the RSO and the Law School.

Depositing Funds

All money raised must be deposited as soon as possible after it has been received. The RSO treasurer personally is responsible for any money from the time it is received until it is deposited. Deposit slips should be filed for audit purposes.

Disbursement of Funds

Disbursement of RSO funds must be by check only. Checks may be written and signed by any member of the organization whose signature appears on the current Bank Account Authorization. Record of each check must be maintained for audit purposes. Signatories may not write a check to themselves without written approval from another signatory on the account.

Bank Accounts

No RSO bank account should have the words “William & Mary Law School” or “Marshall-Wythe School of Law” in the first line of their bank account title. These words may be used only in the second line and only if preceded by “c/o”.

Communication

Email

The SBA sends a bi-weekly email to all students that lists upcoming activities or RSO announcements. The SBA email is sent only once per week and is the only method for an organization to communicate with the entire student population via email. Messages must be received by 9:00 pm each Sunday and Wednesday while classes are in session. Messages are to be submitted at: <https://digests.wm.edu/lawschoolcommunity/>. In extremely rare circumstances, the SBA will send out additional messages to the entire student body.

Additionally, all RSOs are entitled to maintain a RSO email account. All RSOs may maintain email distribution lists for their members and communicate with their members via email and also through tools in TribeLink.

Hanging Files

The Administration will place RSO mail in the hanging file of the student organization president or leader. Please check your student organization hanging file frequently.

Advertising Events within the Law School

Master Calendar

The Law School Master Calendar is accessible through the Law School internal and external sites. The Calendar is a comprehensive record of activities that take place within the School or are sponsored by members of the Law School community. The first step to planning any event is to complete the room request form (see Gloria Todd). When requesting permission to hold events or meetings within the School, please provide a description of the activity. This information will be added to the Master Calendar and provides needed information both for the Associate Dean for Administration approval process and for those who may have an interest in the event or meeting. Each event must be reviewed and then approved by the Associate Dean for Administration. Once approved, the event is placed on the Master Calendar. Every effort is made to minimize conflicting events to ensure each sponsored event has max attendance. To that end, we prefer only three RSO events per 1pm-2pm meeting time. Questions about the Law School Master Calendar can be directed to Ms. Todd.

Monitor Message Board

The Law School maintains a message board in the Law School lobby. The text for this board is auto-loaded from the Law School Master Calendar. Only events on the Master

Calendar will be displayed on the Monitor Message Board during the week. Events on weekends may display agenda (e.g., competition information for Spong Tournament during the event). Contact Matt Rouette well in advance of your need for instructions on use of this display.

SBA Bi-Weekly Email (See “Email” above)

Flyers and Posters

Flyers and /or posters for any Law School sponsored event may be on the bulletin board in the lobby. Nothing may be posted on doors, walls or windows of the Law School.

Hanging Files

The student hanging files may be used to distribute organization fliers.

Display Space

The Trophy Case in the Law School lobby is maintained by the Administration for competition teams only. The display case in the Law School café is for PSF use only.

Advertising Events outside the Law School

Events open to the public should be publicized broadly. If you are hosting an event, visiting speaker, or conference, either at the Law School or in the community, and it is open to the public, the Law School's Communication's Office has suggestions about how to help build an audience for your event. "[How to Publicize Your Upcoming Events](#)" is a page on our website that walks you through how to add your event to the W&M Events Calendar and TribeLink. This site also provides suggestions on ways you can share your event info with the W&M community and beyond.

Events

All events should be approved in advance through the Associate Dean for Administration. Approval can occur only after completing the Room Request Form. The purpose of this approval process is not to restrict student organizations. It simply is to ensure that events do not compete for attendance so there can be maximum participation and result in a successful event.

If sponsoring an event where an important speaker is featured or the Dean is expected to attend, the RSO first must confirm with the Dean's executive assistant, Cassi Fritzius, that the Dean can participate. With confirmation in hand, RSOs can then proceed to seek approval for the event through the described process.

RSOs with faculty advisors should also confirm the details of the event with the advisor in advance of requesting approval for the event.

Event Planning

Determine Purpose of Event

The purpose will drive the invitation list and location of event. Prior to asking guest speakers or advertising, seek permission to hold the event through the approval process. If inviting a guest speaker or requesting the Dean's participation, gain approval for the date and time of the event through the Dean's Executive Assistant. If held within the Law School, complete the Room Request Form.

Seek advisor assistance in identifying and sending invitations to guest speakers.

Seek Approval for Event from Associate Dean for Administration

Submit a completed Room Request Form to Gloria Todd. The request will be given to the Associate Dean for approval.

Once approval is gained, answer these questions for a successfully planed event:

- ❖ What is the estimated number of attendees?
- ❖ Who are the guests? Are any VIPs?
- ❖ Will the event include spouses/significant others?
- ❖ Is the attendance number important for room reservations or ordering food?
- ❖ Is anyone disabled or in need of special services?

- ❖ Will any guest's attendance require coordination with Campus Police or other security measures?
- ❖ Who must be contacted for facilities coordination?
- ❖ What is the budget?

You can also access a helpful planning document on the Event Planning section of MyLaw (under "Departments" select "Event Planning") that will guide you through an event coordination timeline.

Budget

Speak with Jessica Pierson if you need assistance in creating an event budget. All student events must have a budget. When the RSO suspects additional funding will be required (funding outside the organization), a detailed budget for the event must be submitted to the SBA Treasurer. **NO requests for funding are to be taken directly to the Dean** or to the University Student Activities Office. This process ensures a fair distribution of funds to all organizations.

Budgets must include all related expenses such as speaker travel, lodging and food; catering, e.g., dinners, lunches, breaks; special advertising or materials; postage; facility or furniture rental; music or special entertainment; sound systems; etc.

Speakers

RSOs desiring to invite speakers to the Law School must have approval for the event **before** it is scheduled.

Speaker Travel and Accommodation

Arrange all accommodations through Ashlea Edwards. We have billing arrangements with multiple local hotels, and Ashlea can assist you in determining which hotel will be best for your guests.

Travel arrangements can be made through Lou Pulley, Accounting Office. Should Ms. Pulley not be required to assist with the travel arrangements, RSOs must still contact her **in advance of making arrangements** to ensure arrangements meet State and School guidelines. All student or LS employee travel related to school business **requires** travel authorization. Visitors to the Law School do not require travel authorization.

Please reference the Travel Questionnaire document on the Event Planning section of MyLaw (under "Departments" select "Event Planning") to ensure you have collected all

necessary information from your guests. The Travel Questionnaire details the information Ms. Pulley requires if she is booking your guests' travel; it also lists the forms that must be submitted should your guests prefer to book their own travel and then be reimbursed.

Speaker Reimbursement

All speaker-related costs must be considered in the event budget. Original receipts for costs incurred by the speaker are to be submitted to the SBA Treasurer for reimbursement. The itemized original receipts should be attached to a memo that indicates:

- ❖ Purpose of expense (include name of event).
- ❖ Date of event.
- ❖ Name, address and student ID number (930...) of student receiving reimbursement.
- ❖ For reimbursement, a guest speaker must complete and sign a Virginia W-9 form and travel reimbursement release form. The forms may be found on MyLaw (under "Departments" select "Events Planning" and look for Travel Reimbursement Forms.)

The state does have limitations on acceptable reimbursements for lodging and food. A document containing general reimbursement guidelines can be found on the Event Planning section of MyLaw (under "Departments" select "Event Planning"). When in doubt, seek clarification from Jessica Pierson.

Joint Sponsorship from without the University

RSOs may not enter into joint or co-sponsorship of any on-campus project or program with an individual, group or student that is not affiliated with the University.

Recognized Student Organizations may sponsor events and invite outside guests, including members of an outside organization, provided the event will be open to the public, is advertised as such and will be orchestrated by a member of the RSO.

Joint Sponsorship from within the University

RSOs are encouraged to seek co-sponsorship for programs and events. The offices of Career Services and Alumni Affairs/Development; the Law Library; the SBA; and other student organizations have all co-sponsored programs and events when appropriate. Co-sponsorship could be valuable in increasing attendance as well as gaining additional resources.

Parking

Parking on University property requires a pass. A small number of passes (<5) may be obtained from Kay Hibbard in Reception for the event planners to distribute to their guests. Parking passes have a one day life span. For large events where more than 5 passes are required, a request must be made through Ashlea Edwards. These requests should be made well in advance of the event to ensure issues do not arise and release the event planners from distributing parking passes. Event planners should request that their guests park in the lot nearest the Tennis Center. Parking pass fees are set by William & Mary Parking Services – please work with Ashlea to ensure you have properly budgeted for your guests’ parking expenses.

Alcohol

Alcohol may not be served at extracurricular events unless approved by the Associate Dean. Alcohol may not be served at events that begin prior to 4:00 pm and must end by 7:00 pm. When alcohol is served, the organization must follow University [policy](#). RSOs serving alcohol must ensure members of the organization who complete the required training are present at the event.

Under no circumstances may alcohol be sold at the Law School during a RSO event. When charging an admission fee for an event where liquor will be served, the RSO must obtain a liquor license. See the Office of Student Leadership Development for assistance at least two weeks in advance of the event

Room Reservation

Law School practice is to schedule events in smaller rather than larger rooms. Unless the number of guests is an absolute, it is better to create an environment of “standing room only” than to have a guest speak to a room largely of empty chairs. Room reservations must be processed through Gloria Todd. When planning events, contact Gloria Todd early in the process. Ms. Todd will assist to ensure your event will be scheduled in an appropriately sized room and the date selected does not conflict with other events designed to draw a similar audience.

Additional spaces on and off campus may be appropriate for your event.

Vendors

The State has specific guidelines regarding contracting for goods or services. This includes hiring entertainments for the event. Please consult with Kathy Patrie prior to

completing any contract with a vendor. All contracts must be approved by the Law School Administration prior to a RSO commitment with a vendor.

Reimbursement or Payment

All original receipts and invoices are to be submitted to the SBA Treasurer within 15 days following the event. All original receipts must be submitted with a memo that provides following information:

- ✓ Name of event
- ✓ Date of event
- ✓ What the receipts are supporting (e.g., dinner for judges; reception for speaker)
- ✓ If receipts are for food purchase (dinner or lunch) a list of attendees must be attached.
- ✓ Who is to be reimbursed - Name, Address, W&M ID Number (930-number) (no third parties and no RSO can be reimbursed)

Requests for reimbursement must be submitted prior to graduation. **NO EXCEPTIONS.**

Advertising

Posters and Flyers may be posted in the Student Lounge at any time. Signage may NOT be posted in any other location.

Other forms of useful advertising include:

- Email messages to the students via the SBA weekly email message only. Please plan your advertisements in advance of the SBA weekly message due date and time. The Administration will not send individual organizational emails.
- The Internet, when the event is appropriately registered through Gloria Todd, the event will appear on the Law School Master Calendar. The Calendar is viewable both internally on [MyLaw](#) and externally on [the Law School website](#). The more detailed your information to Ms. Todd, the better the calendar information.
- The lobby Monitor Message Board shows all daily events scheduled through Ms. Todd.
- Place information, as appropriate, in newspapers and distribute information to the faculty and campus community.
- Provide information to Cassi Fritzius to publish in *The Docket*.

Catering

Event planners may use any catering company. The University caterers, Sodexo, are very familiar with our building, do a very nice job and make the billing very easy.

Consult with the caterer well in advance of the event. Ensure the menu fits the budget. If using a catering method (such as you) that cannot invoice the Law School, keep all original receipts and submit within 15 days following the event, using the “Reimbursement or Payment Guidelines” outlined in this handbook.

Consider the kind of event when selecting the menu. Beer and pretzels are fine for informal gatherings but visiting VIPs should receive more refined fare. Stand-up, social events should have small, easy-to-eat finger food. Sit-down dinners are better when stringy food (like spaghetti) is not the entrée.

Consider the number of guests and the event budget. Seek guidance from the caterer, Ashlea Edwards or Dean Jackson if in doubt.

Set-up and Clean-up

The Law School has several folding tables (in the Faculty Room kitchen) that may be used. Always return them once your event concludes.

Furniture may be requested from the University or from local companies. Gloria Todd can assist with the request for tables and chairs from the University. Both a delivery and rental charge will be incurred. Keep these costs in mind when building your budget. Some catering companies provide tables (for a fee). Williamsburg Event Rentals is a commonly used company and has a nice variety of rental furniture as well as tents.

Tents fall under a specific State regulation. Should the event require a tent be erected on School property, approval must be sought eight to ten weeks in advance of the event. An approval cost will be incurred and must be budgeted for.

Consider the size of the event and number of guests for housekeeping of the restrooms. If the event is on a weekend, the event planners may want to speak with Gloria Todd about additional housekeeping services prior to the event on Saturday or following the event on Sunday. There is a cost. Plan this into the event budget.

Consider the time of the event. If on a weekend before the Law Library is open, you will need to have the building unlocked for guest entrance. Speak with Gloria Todd to arrange for the front doors to be unlocked. Similarly, if an event extends beyond the Law Library hours, the front doors will need to be secured. Please communicate these details to Gloria Todd.

Event planners are responsible for returning all borrowed Law School furniture to its rightful place immediately following the event. No extra tables or chairs should remain in the lobby other than the two large tables in front of the plasma, the upholstered chairs by these tables; and the table by the John Marshall portrait. Extra chairs taken into or from classrooms should be returned to their rightful home.

Take care with your building. Do not drag furniture across the floors.

Respect the work of the housekeepers. Do not overload trash cans. Do not leave event related debris in the School. Ensure the catering contract includes their removal of catering-related debris.

Helpful Event Tips from the Professionals

✓ Location Planning

If you use the Law School lobby, plan on uninvited nibblers. In other words, plan a bit more food than the number of guests to ensure the guests have sufficient food.

The Penny Commons is a good reception area after school hours. This location is a bit too noisy to hold an event while classes are in session.

Food and beverage set-up for the Faculty Room can be in the Faculty Room kitchen or on the buffets at the entrance to the room. The former is not preferred by the caterers but does ensure some privacy to the catered food.

The Dean's Conference Room is ideal for 12 or fewer guests. The room can get a little warm and is not ideal for buffet-style dining.

✓ Catering

The Law School often uses Sodexo. Sodexo is a proven agency that does a superb job on the food, the presentation and knows the facility. Kerstin Losee is the Sodexo contact. Ms. Losee will work with event planners to produce a good event within their budget.

The Catering Company of Williamsburg frequently is used by the Law School.

For those on a tight budget, food can be purchased at Harris Teeter and Farm Fresh. The Law School has an account for both stores but seek ADVANCE permission to charge at those locations.

Self-catered events can be quite nice but do add to the event planner's work load. Self-catering includes ordering/purchasing the menu items, preparation, serving and clean up.

When planning the menu, remember to have vegetarian items and pork alternatives.

- ✓ Plan Ahead
- ✓ Have Contingencies
- ✓ Common Pitfalls

The biggest pitfall is to underestimate or overestimate the number of people attending an event. If you overestimate, you will have over-purchased leading to waste of resources. If you underestimate, you will have under-purchased and the event will look inadequately prepared.

The worst pitfall are people who either don't RSVP and show up or those who RSVP but don't show. For receptions this may not matter. For seated dinners, this can cause problems.

Travel

General Guidelines

All travel is governed by State regulations. A copy of the regulations is available in the SBA and Accounting offices. For items not discussed in this document, please refer to the State regulations. Always plan as far in advance as possible. Submit all budget requests to the SBA Treasurer. Required to be included in the budget are:

- ◆ Registration - conference registration form and program.
- ◆ Travel costs - the Accounting Office will book travel given sufficient notice (30 days preferred).
- ◆ Housing costs - RSOs must follow State guidelines on housing.
- ◆ Food estimate – RSOs must follow State guidelines for allowable meal costs.
- ◆ Ground Transportation estimate - follow State guidelines on per/mile reimbursement.
- ◆ Parking and miscellaneous expenses - must be itemized.

Travel Authorization

To ensure appropriate booking, provide all information concerning the desired flight as soon as you are aware of your travel needs. At a minimum, students must provide to the Accounting Office:

- ◆ List of travelers.
- ◆ Dates of travel.
- ◆ Destination.
- ◆ Purpose of travel: name of event and RSO sponsoring the travel.

Booking Travel

To initiate the travel process, a point of contact from the RSO shall contact the Accounting Office and provide detailed information regarding the event.

- ◆ All future communication will be directed both to the traveler(s) and the point of contact.
- ◆ Name, email address, birth date and most easily accessible phone number for each traveler is required.

A student may book his or her ticket.

- ◆ Reimbursement is subject to the discretion of the RSO.
- ◆ Individuals seeking reimbursement must provide the original ticket and paid receipt which shows ticket price and method of payment. A copy of the credit card used for purchase must be provided.

A student booking travel arrangements through the Accounting Office must email or visit **Lou Pulley** in a timely fashion.

- ◆ Remember that tickets are cheaper 30 days before travel and become more expensive as your travel date gets closer.

Once travel is booked, the student will be emailed the flight confirmation after the travel authorization is signed.

- ◆ The student is responsible for the trip details. Please read your itinerary thoroughly.

The student will sign a Travel Authorization.

- ◆ All members of the W&M community are required to complete a Travel Authorization prior to travel.

Travel by Automobile

Consistent with the policies of the [Office of Student Leadership Development](#), and to enable to students to most effectively manage their SBA budgets, any student whose travel is funded by student activities' funds (funding typically through the SBA or what is called "1Y money") shall be reimbursed for personal use of their vehicle based on trip-related gasoline receipts that are submitted. There is NO mileage restriction on personal use of student vehicles when used for student travel related to student organization activities.

- ◆ A Travel Authorization must be signed prior to departure.
- ◆ A completed and signed Driver Authorization form must be on file.

Renting a vehicle

Please coordinate with the Accounting Office if wishing to rent a vehicle. For full details regarding renting an automobile, purchasing insurance AND what to do in the case of an accident click [here](#). Please review the entire [vehicle policy](#) before you travel.

- ◆ A Travel Authorization must be signed prior to departure.

- ◆ If renting a van, all drivers **MUST** complete a driving class with W&M Police Department before picking up the vehicle.

The Law School and College of W&M contracts with Enterprise Rental are for the use of employees only. Students and guest speakers will have to pay for any rental vehicles and submit the rental agreement and final receipt for reimbursement.

Reimbursement

Within 10 days of the travel, submit itemized original receipts for reimbursement to your RSO Treasurer with a memo identifying:

- ❖ Purpose of travel.
- ❖ Name, full address and W&M ID number (930-number) of individual to be reimbursed (we cannot reimburse an RSO account).
- ❖ Original, paid ticket receipt must be submitted for ticket reimbursement.

The RSO Treasurer is responsible for providing the above to the SBA Treasurer within 10 days of receipt. It is important to meet these deadlines to ensure timely reimbursement.

The State will allow reimbursement for ORIGINAL receipts ONLY. A credit card receipt does not substitute. An itemized, original receipt is required. If a credit card was used to pay for travel expenses, a copy of the credit card used must be provided.

- ◆ The Law School does not allow per diem reimbursement for food.
- ◆ Allowable housing reimbursement is strictly regulated by the State.
- ◆ If multiple people are included on any expense, please list all names on the receipt or attach a memo.
- ◆ Reimbursement for travel by personal vehicle requires an attached printout that shows the mileage from start to destination (Map Quest is a good tool for this requirement).

The State does NOT reimburse for:

- ◆ Phone bills and internet charges (unless there is a detailed justification, approved by the Accounting Office).
- ◆ Taxis, other than to and from the airport (unless approved by the Accounting Office by submitting a detailed justification).
- ◆ Alcohol.
- ◆ Lost or stolen items.
- ◆ Damage to personal vehicles, clothing or other items.

◆ Movies charged to hotel rooms.

All requests for reimbursement must be submitted as soon as possible after the travel following the above instructions. Reimbursements will not be given for requests made following graduation without express permission from Terri Lorincz. **NO**

EXCEPTIONS.