Policies and Procedures for WSE Student Groups

I. Annual Reporting Responsibility

Beginning of Year
Submit all of these materials to your staff advisor:
- Updates to Constitution/Bylaws
- List of new leadership, including faculty advisor (with email address & phone number)
- Goals Statement
- Budget proposal
  - Should account for all sources of income and projected expenses

Throughout the Year
- Budgets should be developed for all events/major projects.
- Update your organizational budget to track income and spending. Make sure to keep good record of all financial transactions as they happen.
- Activity Summary forms should be completed for each event/activity.

End of Year
  - Financial Report
    - Should include a final budget showing all sources of income and actual expenses
    - Summary of Activities – compile all Activity Summary forms and submit them to your staff advisor.
- Notebook or computer file of all organization information is passed on to the new leadership each year.
- New officers should be elected mid April and they should schedule a meeting with the staff advisor at the end of the April.

Contact Information:
Office of Engineering Advising
103 Shaffer Hall
3400 N. Charles St.
Baltimore, MD 21218
Phone: 410-516-7395
Fax: 443-529-1352

II. General Information and Policies

- Office of Student Activities [http://web.jhu.edu/studentprograms/OSI/home.html](http://web.jhu.edu/studentprograms/OSI/home.html)
- University Recognition [https://johnshopkins.collegiatelink.net/](https://johnshopkins.collegiatelink.net/)
  All JHU groups must register with the Office of Student Activities
  Affiliation: Other
  Category: Special Interest or Academic/Honorary
  Funding: Sponsoring Academic Department
  Advisor: either your faculty or staff advisor (or both)
Membership
- The chapter must be consistent with policies of national organization
- Members must be currently enrolled JHU students

Leadership
- Full-time students in good academic standing (academic standing will be reviewed by the staff advisor each semester – exceptions will be made at the discretion of the advisors)
- WSE students; KSAS students if permitted by national organization

Faculty advisor/chapter advisor/staff advisor
- Should be invited to at least one general body or e-board meeting per year
- The President/Chair should meet/have contact with the advisors at least once per month to keep the advisors apprised of group activities/issues

Advisor Meetings
- Executive board must meet with Office of Engineering Advising once per year
- President and/or treasurer must update Office of Engineering Advising once per month

Professional Development
- Executive board members and general body members are encouraged to attend regional and national training and conferences throughout the year; some expenses may be subsidized by the group’s JHU account (at the discretion of the e-board and advisors)
- Conference payment and arrangements (registration, transportation, hotel, etc) must be discussed with your staff advisor at least 2 weeks prior to the conference registration deadline and 1 month prior to the anticipated travel.

Community Service & Service to University
- Student groups should consistently engage in service to the university and outreach to the community. It is expected that your service activities be part of your annual plan presented at the start of the year. Continued funding from the WSE is contingent upon a service component to your group.

III. Financial Policies
Please note that funding from WSE will vary from year to year depending on the university’s budget. Therefore, student group budgets should be flexible to allow for differences in funding each year.

Service to the University
At least 15% of the WSE funding must be used on-campus to serve the undergraduate student body beyond your own student group with a community-building program. Any additional grants or funding received from other offices cannot count towards this service. You may use the money over the academic year or in one activity. You will need to receive approval from your staff advisor regarding the appropriateness of the service and funding usage prior to the service. The treasurer of each student group will monitor the usage of the funds. Some examples of how to utilize the funds include but are not limited to: guest...
speakers, tutoring, study breaks, and hosting tournaments. If you have questions, please discuss with your staff advisor.

Use of Funds from WSE
- Must receive prior approval for expenses over $100
- If a check is requested from the University, at least 10 business days advance notice is required before the check can be sent out
- You will not be reimbursed for sales tax – please use the tax exempt card when making purchases
- All money must flow through the University account – M&T bank accounts must be closed
- Please try to limit the number of people in your group who are making expenditures and being reimbursed (especially for purchases greater than $100)

Reimbursements
$100 and under: Petty Cash
- Use a petty cash voucher to request reimbursement up to $100; sales tax will not be reimbursed.
- Transportation out-of-state can be reimbursed through petty cash (gas, tolls, parking, etc.) if the total amount per trip is $100 or less.
- Petty cash vouchers must be submitted with an original receipt, description of the event and items purchased, and a listing of the # of people in attendance at event (and names if possible).
- Please use the petty cash form specific to your group with the budget numbers already included. Only complete the black (not gray) areas of the form.
- Submit forms to Jessica Swadow by Thursday; they will be ready for you to pick up on Monday in your group’s mailbox.
- Take approved petty cash forms to the petty cash window in Garland Hall. Petty cash window is open Monday thru Thursday from 10am-2pm.

Over $100: Reimbursement and Vendor Payment Form
- Use Reimbursement and Vendor Payment Form for non-travel related expenses over $100
- Reimbursements must include original receipts along with a description of the expense.
- Expenses must be authorized by student group treasurer.

Travel related expenses: Travel Expense Reimbursement Form
- See Travel Policies section

Deposits
- All checks and cash (dues, donations, grant funding, etc.) must be deposited into the group’s University account.
- Complete a Deposit Form; turn this form in along with the cash/checks (in an envelope) directly to your staff advisor in Engineering Advising.

Working with vendors (caterers, printing, etc)
• Must be done under supervision/guidance of your staff advisor – do not sign any contracts without discussing it with your staff advisor
• All vendor payments will require an original invoice from the vendor.
• Use Reimbursement and Vendor Payment Form
• If a vendor is not already in the Hopkins One financial system, additional information may be required from the vendor. Your staff advisor can help you if you have further questions.

Fundraising
• All fundraising money will be deposited into WSE account and treated as WSE support.
• Grant funds must be applied for under supervision of university offices. Grant funds and donations will be deposited into WSE account. A copy of any grant written must be turned in to Engineering Advising.

IV. Travel Policies
No travel planning and purchasing should occur prior to meeting with your staff advisor first.

To qualify for financial support, all students traveling:
• Must be registered members of the organization.
• Must be in good academic standing – a list of all students planning to attend should be submitted to Engineering Advising before any travel arrangements are made.
• Should be engineering students (exceptions will be made on an individual basis)

Planning
• Travel payment and arrangements (conference registration, transportation, hotel, etc) must be discussed with your staff advisor least one month before travel.
• If the appropriate receipts are not returned within the 3 days of returning from travel, you may be responsible for the outstanding bill, and the future WSE funding may be reconsidered.

Conference Contract
• Before attending any conferences, all attendees must complete and sign a Conference Contract. The Conference Contract should be submitted to your staff advisor 2 weeks prior to the conference. (Please see Conference Contract Policies/Procedures Addendum for detailed information.)
  o It is the organization president’s responsibility to make sure everyone interested in attending the conference knows about the contract.
  o The Student Group Contact must complete the Conference Contract Cover Sheet and submit all of the contracts all at once 2 weeks prior to the conference.
  o Students should not register for a conference before obtaining an approval from the staff advisor.
• If a student for whom conference related fees have been paid on his/her behalf (e.g. registration fees) does not attend a conference, s/he will be responsible for reimbursing the university (via the WSE account)
Reimbursement for Travel Related Expenses

- Use *Travel Expense Reimbursement Form*
- Receipts
  - Must provide receipts for all expenses over $75
  - Must provide original receipts for lodging, phone use (long distance, cell phone, calling cards), transportation (plane/train tickets), and gifts, even if these are under $75.
  - Please turn in all possible receipts, numbered to match your *Travel Expense Reimbursement Form*.
- List the expense in the currency you made the purchase in.