Policies and Procedures for WSE Student Groups

Please read and understand these policies and procedures thoroughly. Please ask your Staff Advisor if you have any questions.

I. Annual Reporting Responsibilities

A. Beginning of Year - please provide to your staff advisor:
   • Updates to Constitution/Bylaws
   • List of new leadership, including faculty advisor (with email addresses & phone numbers)
   • Goals Statement
   • Budget proposal
      ▪ Should account for all sources of income and projected expenses

B. Throughout the Year
   • Budgets should be developed for all events/major projects and submitted to your Staff Advisor.
   • WSE Student Group Activity Summary forms to be completed after each event/activity and submitted to your Staff Advisor. This form is located in JHBox.
   • Maintain and update a spreadsheet of your Student Group Cost Center (account) to track income and spending. Maintain a good record of all financial transactions as they happen.

C. End of Year
   • Annual Report - submitted by April 30th to staff advisor.
      ▪ Financial Report - to include a final account showing all sources of income and actual expenses.
      ▪ Summary of Activities – compile all Activity Summary forms
   • Notebook or computer file of all Student Group information is passed on to the new leadership each year.
   • New officers should be elected by early April. They should schedule a meeting with the staff advisor before they leave campus for the summer break.

Staff Advisor Contact Information:
Eric Simmons
Office of Academic Affairs
Shaffer Hall 103
3400 N. Charles St.
Baltimore, MD 21218
esimmon7@jhu.edu
410-516-7405

II. General Information and Policies

• Office of Homewood Student Affairs - http://studentaffairs.jhu.edu/student-life/

All JHU groups must register with Hopkins Groups at Johns Hopkins University
https://johnshopkins.collegiatelink.net/

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Membership
• The chapter must be consistent with policies of the national organization/group
• 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 the staff advisor once per year
• President and/or treasurer must update the staff advisor 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 Cost Center (account) (at the discretion of the e-board and advisors)
• Conference payment and arrangements (registration, transportation, hotel, etc.) should be discussed with your staff advisor in advance (at least FOUR weeks prior to the conference registration deadline).
Note: international transportation costs are typically the responsibility of the student.

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 Goals Statement presented at the start of the year. Funding from Academic Affairs is contingent upon a service component to your group.

III. Financial Policies and Forms

A. Use of Funds from WSE
• Must receive prior approval from your group’s treasurer and staff advisor 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 university’s Tax Exemption Certificate when making purchases. The certificate is located at: http://ssc.jhmi.edu/supplychain/forms/jhu_forms/jhu_tax_exemption_cert.pdf
• Some vendors may require the JHU Tax I.D. Number – see JHBox
• All money must flow through the University via your Student Group Cost Center (account)

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• Please limit the number of people in your group who are making expenditures and being reimbursed (especially for purchases greater than $100)
B. Reimbursements

1. $100 and under: Petty Cash
   • Use a Petty Cash Voucher to request reimbursement up to $100; sales tax will not be reimbursed.
   • Please use the Petty Cash Voucher form specific to your group with the Charge To: numbers already included. Only complete the black font (not gray) areas of the form.
   • 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 the event and their names.
   • Transportation out-of-state can be reimbursed through petty cash (gas, tolls, parking, etc.) if the total amount per trip is $100 or less.
   • Submit Petty Cash Voucher forms to your Staff Advisor Eric Simmons, Shaffer Hall, Suite 103. You will receive an email when forms are ready for you to pick up.
   • Take approved petty cash forms to the petty cash window on the lower level of Garland Hall (next to Student Employment Services) to collect your reimbursement. Certain hours apply. See petty cash form.

2. Over $100: Reimbursement and Vendor Payment Form
   • Expenses over $100 must be authorized by your student group’s treasurer prior to purchase.
   • Use Reimbursement and Vendor Payment Form for non-travel related expenses over $100.
     • Your group’s treasurer must sign this form.
   • Reimbursements must include original receipts along with a description of the expense.
   • Submit reimbursement forms to your Staff Advisor Eric Simmons, Shaffer Hall, Suite 103.

C. Travel related expenses: Travel Expense Reimbursement Form
   • See Travel Policies section

D. Deposits
   • All checks and cash (dues, donations, grant funding, sponsorship funds, etc.) to be deposited into the WSE Student Group’s University account called a Cost Center. (WSE Staff Use: all donations to Cn DAR)
   • Complete a Deposit Transmittal Form, which you can access in JHBox. Turn this form in along with the cash/checks (in an envelope) directly to your staff advisor in Academic Affairs.

E. Working with vendors (caterers, printing, etc.)
   • Must be done under supervision/guidance of your staff advisor – please do not sign any vendor or sponsor agreements, contracts, etc. Discuss with your staff advisor first.
   • All payments to vendors will require an original invoice from the vendor.
   • Use the Reimbursement and Vendor Payment Form
   • If a vendor is not already documented in the JHU financial system, SAP, additional information may be required from the vendor. Your staff advisor can help you if you have further questions.

F. Fundraising
   • All fundraising money will be deposited into your group’s Cost Center (account) and treated as WSE support funds.
   • Complete a Deposit Transmittal Form.
   • Grant funds must be applied for under supervision of university offices. Grant funds and donations will be deposited into your group’s Cost Center. A copy of any grant written must be turned in to your Staff Advisor, WSE Academic Affairs, Shaffer Hall 103 prior to submission, for review and approval.
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IV. Travel Policies

A. To qualify for financial support, all students traveling:
• Must be registered members of the Student Group.
• Must be in good academic standing – a list of all students planning to travel should be submitted to your Staff Advisor before any travel arrangements are made. (This applies when travel involves missing university classes, labs, etc.)
• Students travelling must be JHU engineering students (exceptions will be made on an individual basis).

B. Planning
• Travel payment and arrangements (conference registration, transportation, hotel, etc.) should be discussed in with your Staff Advisor in advance (at least one month before domestic travel and two months before international travel). Note: international transportation costs are typically the responsibility of the student.
• Hotel arrangements – should be made in consultation with your staff advisor.
• ALL travel arrangements made on behalf of JHU, and WSE Student Groups, MUST be made through the vendor World Travel, Inc. (please see World Travel, Inc. Information Sheet in JHBox).

C. Conference Contract
• Prior to attending any conferences, all attendees must complete and sign a Conference Contract form. (Please see Conference Contract Policies/Procedures Addendum for detailed information. This document is in JHBox.)
  o It is the Student Group president’s responsibility to make sure each group member interested in attending the conference provides a copy of the Conference Contract, and s/he assists with completing the Conference Contract where needed.
  o Signed contracts must be given to the staff advisor before the registration is paid.

• 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 the total amount expended on their behalf (via the group’s Cost Center).

D. Reimbursement for Travel Related Expenses
• Use Travel Reimbursement Form found in JHBox.
• Receipts
  o Must provide original receipts for all expenses. See Receipt Guidelines for Reimbursement in JHBox.
  o Must provide an itemized statement of the hotel bill within 3 days of returning from travel, other receipts that are required include phone use (long distance, cell phone, calling cards), transportation (plane/train/bus tickets). Make sure to bring, to your staff advisor.
  o Please turn in all possible receipts, numbered to match your Travel Reimbursement Form.
• List the expense in the currency you made the purchase in.

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